Created with Vision ~ to be Promoted and Preserved

A Review of the Provincial Parks System and Recommendations for a Sustainable Future

Submitted to
Tourism PEI

Prince Edward Island

November 30, 2001

amec ENTERPRISE MANAGEMENT CONSULTANTS

James C. Johnson Associates

Table of Contents

Acknowledgements

Executive Summary 1

1. **Study Purpose and Process** 4

2. **The Provincial Parks System** 5
   - 2.1 Description 5
   - 2.2 Human Resources 6
   - 2.3 Campground Sites 6

3. **Parks Visitation, Occupancy and Visitor Origins** 8
   - 3.1 Historic Visitation 8
   - 3.2 Park User Origins and Demographics 9
   - 3.3 Camper Survey 12

4. **Financial Analysis** 14
   - 4.1 Historical 14
   - 4.2 Financial Projections 15

5. **Physical Conditions and Capital Improvement Requirements** 16

6. **Mill River Fun Park** 17
   - 6.1 Background 17
   - 6.2 Concept Development 18
   - 6.3 Next Steps 19

7. **Confederation Trail** 20
   - 7.1 A Linear Park 20
   - 7.2 New Trail Development Project 21

8. **Brookvale Provincial Winter Activity Park** 23

9. **The Value of Tourism Expenditures Generated by Campers in the Province and in the Provincial Parks System** 24
   - 9.1 The Total PEI Camping Industry Tourism Expenditures 24
   - 9.2 Provincial Parks Expenditure Impacts 24

10. **Future Trends in Outdoor Recreation** 26

11. Provincial Parks Review – Recommendations for a Sustainable Future 28

- 11.1 Conclusions 28
- 11.2 Mandate 29
- 11.3 Parks Planning, Classification and New Parks Development Policy 30
- 11.4 Natural Values of Provincial Parks 34
- 11.5 Community Relations and Communications 36
- 11.6 Divestiture of Parks 37
- 11.7 Human Resources 39
- 11.8 Organization Structure 41
- 11.9 Revenue Initiatives, Financial and Cost Management 42
- 11.10 Marketing 45
- 11.11 Capital Improvements 47
- 11.12 Buffaloland Provincial Park 48
- 11.13 Confederation Trail 49
- 11.14 Mill River Fun Park 50
- 11.15 Brookvale Winter Activity Park 51

Appendix

- Capital Improvement Estimates
- Mill River Concept Plan
- Financial Statements 2000 and 2001 Seasons
- Proforma Financial Plan
- List of Persons and Groups Consulted
- Benchmarking and Best Practices User-Pays Revenue

Acknowledgements

The following people participated in the study process and contributed greatly by providing information and guidance during the research and consultations process.

Study Steering Committee who guided the study process:

Tourism PEI officials: Ron MacNeill, Chris Jones, and Shane Arbing
Community/industry representatives: Doreen Sark and Aurell Johnston

Tourism PEI officials who readily provided parks statistics, financial information and parks survey data:

Vanessa Buote, Susan Leduc, Dolly Carmody, and Doug Murray.
John Callaghan assisted James C. Johnson Associates Inc. in the assessment of the physical condition of Provincial Parks.

Park officers and officials throughout the system were very cooperative and helpful.

Many community/park committees, organizations and individuals provided valuable insight into Parks' issues. Their input has been considered and synthesized in the preparation of this report.

The consultants wish to thank all contributors for their input and support.

103-00732/

Executive Summary

The consultants present to Tourism PEI our findings and conclusions on the review of the Provincial Parks System. ***Created with Vision ~ to be Promoted and Preserved*** is a common theme throughout this report. The research and extensive consultations effort behind this report is significant. Our goal is to proactive in expressing what we believe to be a sustainable future for the Provincial Parks System. A future that builds on the vision of the parks' builders, by reinvesting in the stewardship and opportunities offered by Islanders' and visitors' appreciation of the parks system.

This review examined the mandate, facilities, operations, management, financial issues, and tourism/economic development values of the parks system. We consulted with over 200 residents and visitors in 38 meetings throughout Prince Edward Island. We concluded that like health and education, parks are an essential government responsibility because parks play an integral role in a citizen's sense of identity, well being and place. They are an important part of our culture and are enjoyed by all demographic groups. Parks are a public trust and must be provided proper support. Some basic conclusions guide our detailed recommendations. These conclusions are:

- ✓ The Provincial Parks System was created with vision; strategically located throughout the province, high quality camping, beach, nature and recreation experiences are available.

- ✓ The Provincial Parks System has a vital role in providing:
  - residents with outdoor recreation opportunities and a "place to go" to enjoy nature, and
  - visitors with an assurance of an initial high quality base from which to further explore the Island's attributes.

- ✓ The Provincial Parks System has experienced significant and increasing levels of visitation.

- ✓ The Provincial Parks make a net annual investment of about $1.5 million, which generate $8.5 million in direct expenditures and present valued recreational opportunities to the public.

- ✓ The Provincial Parks System is tired, has been neglected for too long; and needs significant capital, management, structural and operational improvements.

The report contains 34 recommendations on:

1. Mandate.
   A mission statement is presented with a multi-purpose mandate that encompasses stewardship, outdoor recreation, and tourism.

2. Parks planning, classification and new parks development policy.
   Develop resource management, operating and development plans for parks and adopt a park classification system consisting of: natural environment parks, recreation parks, wayside and beach access parks, and resort parks.

3. Natural values.
   Conduct a review of the natural values in parks to identify sensitive areas for protection and education/interpretation opportunities.

4. Community relations and communications.
   Improve communications with community stakeholders by committing to an ongoing consultation process with park committees.

5. Divestiture of parks.
   Divestiture should not be a priority, except where local community interest demonstrates commitment to high standards and long term viability.

6. Human resources.
   Allocate park workers throughout the system in a flexible manner to meet park requirements. Provide Park Officers with management training and empower them with more responsibility and authority.

7. Organization structure.
   Reorganize and reinforce the management team to bring more leadership and expertise in finance, parks operations, programming and maintenance.

8. Revenue initiatives, financial and cost management.
   Generate additional revenues from a variety of sources while respecting the mandate and integrity of the parks system. Retain revenue within the system to reinvest and create a more entrepreneurial environment.

9. Marketing.
   Invest in market planning and marketing. Use the marketing expertise at Tourism PEI and the Tourism Marketing Authority and integrate the marketing of parks into the Provincial Tourism Marketing Plan. Review the parks reservation system with a view to modernizing it.

10. Capital improvements.
    Invest a minimum of $1.5 million for immediate critical requirements to meet basic health and safety issues, accessibility issues, and to upgrade the general appearance of the parks.

11. Buffaloland Provincial Park.
    Divest Buffaloland for a nominal fee to the community based group interested in establishing the "Harvey Moore Centre at Milltown Cross".

12. Confederation Trail.
    Continue to support the development of the trail, develop a strategic approach to its marketing within the parks system, and complete the Borden-Carleton portion.

13. Mill River Fun Park.
    Continue to support the development and operations of the Mill River Fun Park as an integrated development with the campground, and other recreational opportunities at Mill River. Prepare a master plan to move forward the "Mill River Recreational Resort" concept.

14. Brookvale Winter Activity Park:
    Continue to support the operations and maintenance of the Brookvale Winter Activity Park as an important part of the Provincial Tourism product.

The natural and tourism values of the Provincial Parks System, the public interest in these values, and the social and economic benefits Islanders derive from parks all point to the wisdom of sustaining the system. Such a valuable public asset should be revitalized.

1. Study Purpose and Process

Enterprise Management Consultants in association with AMEC and James C. Johnson Associates Inc. was commissioned by Tourism PEI to conduct a review of the Provincial Parks System. The review was guided by a Steering Committee consisting of Tourism PEI officials and representatives from the parks community and tourism industry. The purpose of the review was:

- ✓ To conduct an assessment of the mandate, facilities, operations, management, financial issues, and tourism/economic development values, surrounding the organization and management of the Provincial Parks system; and
- ✓ To seek the most feasible future direction for the operations of the Provincial Parks system including recommendations for community involvement and capital investment strategies.

The study objectives are:

- ✓ To assess the:
  - mandate,
  - organization,
  - operations and management,
  - physical facilities,
  - financial performance, and
  - tourism/economic development values of the Provincial Parks System;
- ✓ Determine most feasible future direction;
- ✓ Develop strategies for community involvement;
- ✓ Identify opportunities for additional revenues; and
- ✓ Estimate capital improvement requirements.

Throughout the summer of 2001, the consultant team undertook the following activity:

- ✓ Parks visited and physical conditions assessed,
- ✓ Visitation, Exit Survey and financial data obtained and reviewed,
- ✓ Park user survey implemented throughout parks system, and results tabulated,
- ✓ Consultations held with all park supervisors, parks management, Tourism PEI senior officials, other provincial departments, some MLA's, interested individuals, various community leaders, park stakeholder groups, private operators, and Parks Canada (see list in appendix),
- ✓ Research was conducted on best practices, trends, and policies in other jurisdictions, and
- ✓ Public forums were held in eastern and western PEI and a status report was presented at the Tourism Industry Association of PEI's annual meeting.

2. The Provincial Parks System

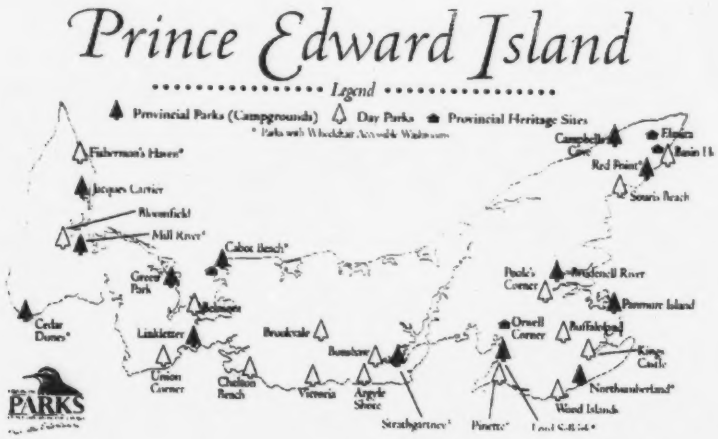
2.1 Description

The Provincial Parks system consists of 29 properties. There area 13 campground parks; seven in the western and central part of PEI; Jacques Cartier, Mill River, Cedar Dunes, Green Park, Cabot Beach, Linkletter, and Strathgartney; and six campground parks in the eastern part: Campbells Cove, Red Point, Brudenell River, Panmure Island, Northumberland, and Lord Selkirk.

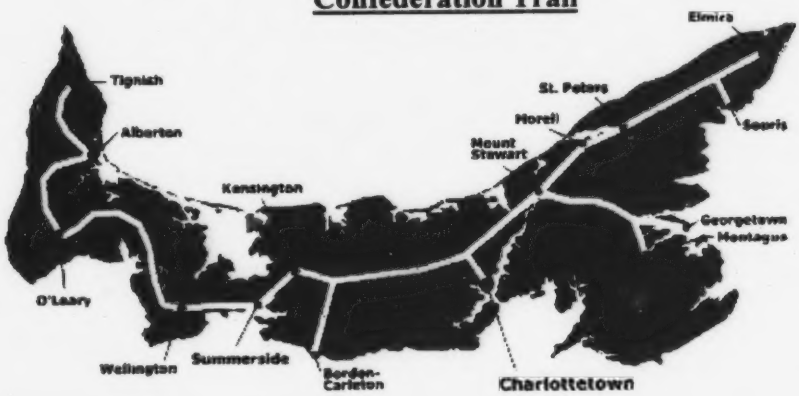
In addition, the Provincial Parks System has 10 day use/wayside parks, plus developed attractions at Basin Head, Kings Castle and Buffaloland

The Confederation Trail, Mill River Fun Park and Brookvale Provincial Winter Activity Park complete the Provincial Parks system.

Provincial Parks



Confederation Trail



Much of the system was built in the 1960's and early 1970's. The Confederation Trail was completed tip to tip in 1999. Parks were strategically placed throughout the east and western parts of the province with a goal to drive tourism to those areas, in scenic coastal areas, most with beach access. Parks offer camping, beaches, trails, alpine and nordic skiing, nature experiences, recreation and interpretive programming.

2.2 Human Resources

The Parks System has two divisions; Parks East, and Parks West that operate and maintain the parks. These divisions report to PEI Manager of Parks. Programs, Brookvale Provincial Winter Activity Park and Stores also report to the Manager of Parks. The Parks System employs 213 seasonal employees. There are 184 summer employees (Officers, Workers, Administration, Maintenance, Programs Personnel and Surfguards), and 29 winter at Brookvale Provincial Winter Activity Park. In addition, the Employment Development Agency places workers at parks on occasion for site maintenance work. Four full time management and administrative personnel are employed in Charlottetown.

2.3 Campground Sites

There are 975 Provincial Parks camping sites throughout the 13 campgrounds. 50% are unserviced, and 50% have some level of services (2-way or 3-way).

Table 1
Campground Sites in Provincial Parks

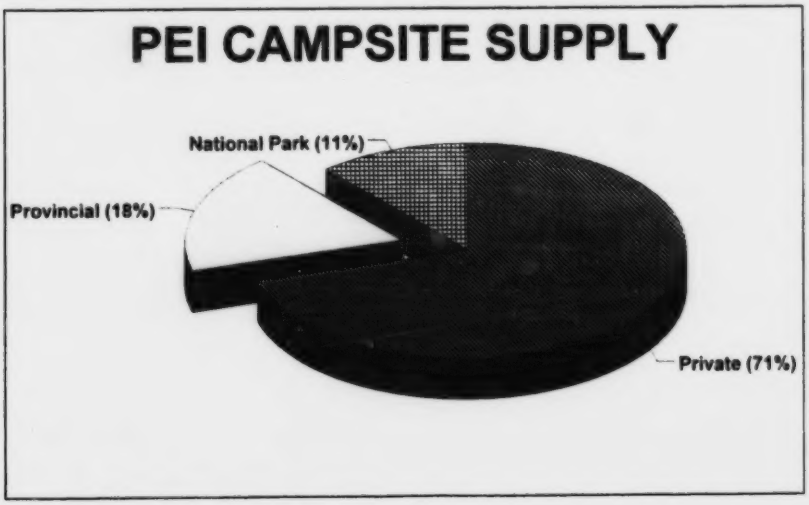
PARKS EAST	Unserviced	2W	3W	Total	% Total
Cambell's Cove	40		8	48	5%
Red Point	32	12	45	89	9%
Brudenell	52	18	25	95	10%
Lord Selkirk	23	56	0	79	8%
Northumberland	21	21	10	52	5%
Panmure Island	22	21	0	43	4%
Total East	190	128	88	406	42%
PARKS WEST					
Strathgartney	41	21	0	62	6%
Cabot Beach	104	30	28	162	17%
Cedar Dunes	20	53	0	73	7%
Green Park	40	0	18	58	6%
Jacques Cartier	22	36	0	58	6%
Mill River	18	18	36	72	7%
Linkletter	51	17	16	84	9%
Total West	296	175	98	569	58%
Total PEI	486	303	186	975	100%
	50%	31%	19%	100%	

Provincial campsites represent 18% of PEI's total campsite inventory. There are 3,792 sites in privately operated campgrounds, 71% of PEI's campsite inventory. The National Park has 602 sites, 11% of PEI campsite inventory. Twenty-six percent of private campsites are unserviced, and 74% have some level of service. Forty-eight percent of the private operators have 3-way sites service compared to 19% of Provincial Parks.

Table 2
Campground Sites in PEI

Type of Campground		# of Parks	Unserviced	2W	3W	Total	%
Private Campgrounds	East	10	102	29	231	362	
	Central	15	702	876	1419	2997	
	West	9	196	61	176	433	
Total		34	1000	966	1826	3792	71%
	%		26%	25%	48%	100%	
Provincial Campgrounds	East	6	190	128	88	406	
	Central	2	145	51	28	224	
	West	5	151	124	70	345	
Total		13	486	303	186	975	18%
	%		50%	31%	19%	100%	
National Park		5	495	16	92	603	11%
			82%	3%	15%	100%	100%
Grand Total		52	1981	1285	2104	5370	
	%		37%	24%	39%	100%	

Chart 1

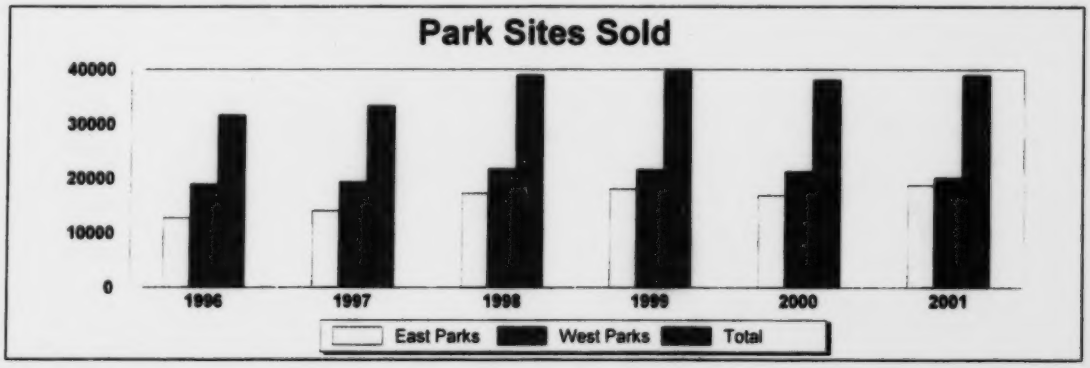


3. Parks Visitation, Occupancy and Visitor Origins

3.1 Historic Visitation

The Chart # 1 below reveals that overall visitation in Provincial Parks campgrounds has increased substantially after Confederation Bridge construction. Site nights sold in 1996 were 31,556 and increased 23% to 38,926 by 2001.

Chart 1



In Year 2001 a total of 38,926 site nights were sold, hosting an estimated 29,000 people or 8000 parties. (Exit Survey data reveals that average party size was 3.6 and campers stayed an average of 4.85 nights) This represented a 2% increase from 2000 when 38,141 site nights. Total parks' occupancy throughout the whole 2001 season averaged 39%, an increase of 2% over 2000. This increase in occupancy occurred while an additional 2.5% site nights were available due to longer seasons in some parks and a small expansion of 12 new sites in Green Park. In 2001 Red Point in the east and Jacques Cartier in the west enjoyed the highest total season occupancies rates with 51% and 58% respectively. Red Point (29%) and Brudenell (25%) in the east make up 54% of the site nights sold. In the west, Cabot hosted 23% of the market, followed by Linkletter with 21%.

All eastern parks experienced growth in 2001 over 2000. In the west, Cabot decreased, mainly due to a one-time visitation in 2000 of a large motor home caravan. Jacques Cartier also declined (9%) in 2001. Mill River declined slightly in 2001 by 94 site nights.

In 2001, overall peak season (July/August) occupancy in the total Provincial Parks System was 55% with eastern parks experiencing 62% and the western parks 50% occupancy. The highest peak season occupancy was experienced in Red Point at 82% followed by Brudenell at 64% and Pamure Island at 60%. In the west Jacques Cartier and Linkletter experienced 67% and 66% occupancies during peak season.

Table 3
2000 & 2001 Parks Visitation

	2000			2001			2001-2000
East Parks	**Site Nights**	**%**	**% Occupancy**	**Site Nights**	**%**	**% Occupancy**	**Occupancy Increase**
Campbells	1312	8%	32%	1895	10%	43%	44%
Northumberland	2454	15%	39%	2505	13%	39%	2%
Pamure Island	1451	9%	42%	1731	9%	49%	19%
Brudenell	4257	25%	37%	4871	26%	42%	14%
Red Point	4901	29%	49%	5266	28%	51%	7%
Lord Selkirk	2483	15%	33%	2519	13%	32%	2%
Total/Avg East	**16858**	**100%**	**39%**	**18787**	**100%**	**43%**	**11%**
West Parks							
Cabot	7722*	36%	48%	4662	23%	28%	(40%)
Cedar Dunes	2141	10%	43%	2553	13%	50%	19%
Green	832	4%	16%	1214	6%	22%	46%
Jacques Cartier	2836	13%	65%	2584	13%	58%	(9%)
Linkletter	3310	16%	37%	4136	21%	46%	25%
Mill River	2878	14%	33%	2784	14%	32%	(3%)
Strathgartney	1564	7%	30%	2206	11%	41%	41%
Total/Avg	**21283**	**100%**	**40%**	**20139**	**100%**	**37%**	**(3%)**
Grand Total	**38141**		**37%**	**38926**		**39%**	**2%**

*Note: in 2000, Cabot hosted a large caravan (about 2000 units) and in 2001 the Boy Scout Jamboree reduced season.

3.2 Park User Origins and Demographics

Table 4 below reveals in 2001, 26% of the campers in eastern parks and 24% of campers in western parks were from PEI. Lord Selkirk and Mill River share the highest PEI origins with 49% followed by Cedar Dunes, Jacques Cartier and Green Park. The origins of visitors are similar in east and west parks except the east parks enjoy more Nova Scotia visitors by virtue of their closer proximity to the Northumberland Ferry service.

A special computer tabulation of the Tourism PEI 2001 Exit Survey results was made available to differentiate pleasure visitors whose primary accommodation was campgrounds or trailer parks. Data shown in table 4 was derived from parks visitation data and the 2001 Exit Survey reveals that Provincial Parks are a popular location for Quebec (24%) and Ontario (26%) residents, 50% of park campground visitors.

Interestingly, while Provincial Parks are highly favoured by Quebec residents, they represent 17% of the market for all PEI campgrounds and only 8% of PEI's total visitation.

Table 4

ORIGIN OF CAMPERS 2001 EASTERN PARKS

	Campbells	North	Pamure	Brudenell	Red Point	Selkirk	Total
NS	7%	9%	19%	16%	13%	16%	14%
NB	4%	8%	7%	9%	9%	6%	8%
ONTARIO	24%	26%	30%	25%	20%	32%	25%
QUEBEC	35%	21%	21%	18%	36%	14%	25%
OTH. CAN	3%	10%	5%	6%	4%	12%	6%
NEW ENG	17%	8%	10%	10%	9%	6%	10%
OTHER USA	8%	16%	6%	13%	7%	12%	10%
FOREIGN	2%	3%	2%	2%	1%	3%	2%
Total Visitors	100%	100%	100%	100%	100%	100%	100%
PEI %	14%	25%	14%	24%	26%	49%	26%
TOTAL	1895	2505	1731	4871	5266	2519	18787

ORIGIN OF CAMPERS 2001 WESTERN PARKS

	Cabot	Cedar	Green	Jacques	Linkletter	Mill River	Strath	Total
NS	11%	6%	11%	7%	8%	13%	13%	10%
NB	8%	10%	8%	8%	12%	14%	10%	10%
ONTARIO	31%	28%	22%	26%	27%	21%	27%	27%
QUEBEC	29%	24%	19%	28%	22%	11%	19%	23%
OTH. CAN	4%	5%	7%	5%	10%	8%	11%	7%
NEW ENG	8%	16%	6%	17%	8%	6%	7%	9%
OTHER USA	8%	8%	24%	8%	11%	24%	12%	12%
FOREIGN	0%	3%	3%	2%	2%	3%	2%	2%
Total Visitors	100%	100%	100%	100%	100%	100%	100%	100%
PEI	11%	39%	35%	38%	5%	49%	13%	24%
TOTAL	4662	2553	1214	2584	4136	2784	2206	20139

Table 5

2001 Visitor Origins

	Provincial Parks	All PEI Campers	All PEI Visitors
NS	12%	22%	19%
NB	9%	16%	10%
ONTARIO	26%	20%	27%
QUEBEC	24%	17%	8%
OTH. CAN	7%	8%	11%
NEW ENG	10%	9%	8%
OTHER USA	11%	7%	15%
FOREIGN	2%	2%	3%
Total Visitors	100%	100%	100%

The 2001 Exit Survey reveals other important information about campers who used "all" PEI campgrounds and trailer parks, not only the Provincial Parks. The following is a summary of the Tourism Exit Survey results.

2001 Visitor Exit Survey Summary
Pleasure Visitors who Overnighted in Campgrounds and Trailer Parks

- Main reasons for trip were "just to see PEI" (35%) and 24% "rest, relaxation, and escape"
- 58% visited other Atlantic Canada destinations
- 43% made their plans over 12 weeks prior to their visit, 26% made plans within 4 weeks
- 83% traveled by private motor vehicle, 14% by recreational vehicle (RV)
- 23% were single travelers, 35% single couples, 41% family with children, and
- 21% traveled together as a group of friends/adults.
- For all PEI pleasure visitors, the profile is almost reversed; families with children r represented 27% of all PEI pleasure visitors, and 44% were single couples.
- Average party size of campers was 3.6, increasing from 3.5 in 2000, and 3.3 in 1999. The party size of all pleasure visitors was slightly smaller at 3.02 in 2001
- Average length of stay was 4.85 days, increasing from 4.8 in 2000, and 4.47 in 1999. The average length of stay of all pleasure visitors in 2001 was similar at 4.56 days.
- The ratio of repeat to first-time visitors at campgrounds was 61% - 39%. The ratio of all pleasure visitors to PEI was 59% - 41%
- Average party expenditure was $647.60, increasing from $622.45 in 2000, and $489.89 in 1999. Average party expenditure in 2001 for all PEI pleasure visitors was $794.82
- 47% indicated Cavendish area was their main overnight destination, followed by the Beaches (10%) and other regions less than 10%.
- 51% made advance reservations
- Information sources used by campers: Word of mouth (18%), PEI Travel Info Package (16%), Other Travel Books (11%), AAA/CAA (10%), Tourist Info Centres in NS & NB (12%), TV Program or Advert (19%), Internet/PEI/Tourism Website (16%)
- Campers who visited all (private and public) campgrounds are younger than all PEI pleasure visitors, more are engaged in the work force, and they have with slightly less education and income.

Table 6
PEI Camper Demographics

Characteristic		PEI Campers	All Pleasure Visitors
Age:	Under 30	14.5%	8.4%
	30 – 50	53.0%	41.7%
	50+	32.5%	49.8%
Education:	< Grade 12	4.0%	4.0%
	High School	18.6%	17.5%
	Some Post- Secondary	14.4%	13.3%
	Community/Technical College	21.8%	19.5%
	University Grad	24.1%	24.3%
	Post Grad/Professional	16.7%	20.8%
Income:	< $20,000	2.8%	2.7%
	$20M - $35M	12.2%	9.3%
	$35M- $50M	17.8%	16.1%
	$50M-$75M	23.0%	22.2%
	$75M-$100M	18.4%	15.9%
	>$100M	11.4%	17.9%
	Refused	14.4%	16.0%
Employed:	Full Time	68.4%	57.4%
	Part time	5.6%	7.3%
	Retired	17%	27%

3.3 Camper Survey

A survey of 398 park users delivered throughout the Provincial Parks System during the summer of 2001 revealed the following:

- average persons per party: 2.7
- average length of stay: 2.74 days
- 80% were first time visitors
- 50% visited other Provincial Parks
- 92% plan to or have visited other parks in NB and NS
- 89% of respondents were visitors, 11% residents
- main activities were ocean related, beaches, scenery, sightseeing, hiking, walking, trails, relaxation, camping/campfires, privacy, water activities, boating, kayaking, canoeing, fishing and bird watching
- They were from; Ontario 26%, Quebec 17%, Other US 14%, NS 13%, Other Canada 12%, New England 8%, NB 6%, Foreign 2%, NFLD 1%

Ratings provided for a number of park attributes and customer service indicators were very positive:

- Cleanliness/sanitation: 84% excellent or above average
- Resource protection/condition of natural resources: 81% excellent or above average
- Safety/security: 83% excellent or above average
- Staff: 91% excellent or above average
- Registration and booking process: 87% excellent or above average

Area and interpretative information, availability and suitability of park interpretative and recreational programs were rated positive, but lower than park attributes and customer service aspects:

- Availability of basic information about surrounding area: 70% extremely satisfied or very satisfied
- Availability of interpretative information: 60% extremely and very satisfied
- Availability and quality of park interpretative and recreation programs and children's activities: 66% extremely satisfied or very satisfied
- Suitability of park facilities for activities: 70% extremely satisfied or very satisfied

Over 200 recommendations were made for improvements. Themes surfacing were:

- Infrastructure improvements in campsites, facilities and playground areas
- More washrooms and laundry facilities
- More space between trailer sites
- Better signage directing to parks and internal signs
- Better roads
- Cleaner beaches
- Recycling receptacles
- More nature trails
- Swimming pools

Positive comments included: scenic setting, beach proximity, and staff.

Recommendations for improvements included:

- Reservation system problematic, locals and relatives get preferences
- Trailer sites on water front restrict views for others
- More interpretative programming on natural aspects
- Fire control policies confusing - fire pits need work
- Noise issues at some parks
- Lack of French speaking personnel
- Mosquito control desired

4. Financial Analysis

4.1 Historical

The Provincial Parks System has an operating budget of $2.4 million. Approximately $750,000 in revenue is generated by the 13 campground parks. This leaves a net requirement of $1.65 million by the Provincial Government to manage and operate the system. A review of financial information from the 2000 and 2001 operating seasons reveal the following:

- The 10 day use parks cost approximately $100,000 per year to operate. Wages represent $75,000 of this amount.
- Campground parks direct operating cost are $1,000,000. Wages at the campground parks average 80% of operating costs at $800,000 per year.
- In addition to campground parks' direct operating costs, regional operations consisting of mobile maintenance crews and administration cost another $270,000
- Campground revenues amount to $750,000 leaving a net requirement of $500,000 to operate the campground parks.
- Overall payroll in the system totals about $1.5 million, about 63% of the total operating budget.
- Parks with built attractions at Basin Head, Buffaloland, Kings Castle and Mill River Fun Park cost a total of $150,000 per year to operate. Revenues were $55,000 at Mill River Fun Park. Revenues at Basin Head and Kings Castle was $4,000 each.
- In winter 2000, Brookvale Winter Activity Park generated $328,000 in revenue with expenses of $411,000.
- Management and administration for the total system average $400,000 per year.
- Average campsite site revenue in the system is $757.

Table 7
Campground Parks Revenue Analysis

Park	Sites	Revenue/Site
Red Point	89	$1,127
Brudenell	95	$981
Pamure Island	44	$935
Jacques Cartier	56	$927
Mill River	72	$859
Northumberland	60	$841
Linkletter	84	$761
Cedar Dunes	59	$693
Cabot	163	$680
Lord Selkirk	77	$630
Campbell's Cove	53	$524
Strathgartney	62	$477
Green Park	70	$342
Total	**984**	**$757**

4.2 Financial Projections

The following summary operating budget for the Provincial Parks System was developed to demonstrate the level of net investment required in various parts of the system. After revenues, the total net operating investment required by the system is $1.5 million. More detailed statements are available in the appendix.

Table 8

PEI Provincial Parks System
Proforma Revenue and Expense Summary

	Revenue	Operating Costs	Salaries Wages	Total Expenses	Net
Day Use Parks		30,000	4,752	34,752	(34,752)
Built Attractions	368,000	241,000	270,082	511,082	(143,082)
Campground Parks	733,000	246,000	550,335	796,335	(63,335)
East/West Maintenance/Administration		215,000	359,152	574,152	(574,152)
Management & Administration		400,000	285,000	685,000	(685,000)
Grand Total	1,101,000	1,132,000	1,469,321	2,601,321	(1,500,321)

These projections are based on a number of assumptions that are founded mainly on Parks Management allocating parks staff in a more flexible manner throughout the system.

Assumptions:

- Park staff to be allocated to parks on basis of need and demand, yet still maintaining a minimum of 14 weeks employment per park worker.
- Staff in most day use parks form part of larger campground parks staff compliment.
- Parks operating period same as in 2001, although flexibility in staff allocations will permit some to open earlier and close later.
- The management team includes a new Manager of Programs and Operations, and a separate Finance Officer.
- A separate marketing budget of $125,000 for parks is allocated.

5. Physical Conditions and Capital Improvement Requirements

The engineering consulting firm James C. Johnson Associates Inc. conducted a detailed inventory and assessment of the physical condition of parks buildings and facilities. A summary capital improvement listing is in the appendix of this report. Detailed parks assessments and data sheets are available in a separate document made available to Tourism PEI. Capital improvement estimates total **$4.1** million over the next 5 years.

Immediate requirements	**$1,735,800**	
1– 5 years	**$2,371,200**	**$4,107,000**
5 – 10 years	**$1,389,000**	
Total	**$5,487,000**	

A summary their findings follow:

Buildings
- 80% of washrooms are not wheelchair accessible
- Some wheelchair ramps not to standard
- Barriers exist even in wheelchair accessible washrooms
- "Tired" appearance of buildings, plywood is delaminating
- "Tired" appearance of campgrounds
- Park Offices are too small and lack staff washrooms
- Campground washrooms lack ventilation; flooring is unappealing

Safety
- Cliff / bank protection for walkers and drivers required
- Some buildings used by staff appear to be structurally unsound
- Water Systems/Sewer
- Many wells do not have well caps
- Concrete block septic tanks: condition not known and may be leaking
- Capital investment planned for 2001, but not completed will need to be fulfilled and augmented in future

Campsites
- Serviced sites not large enough for today's RV's
- Layout of individual RV sites poor
- Campsites outfitted with cooking firepits, but users desire campfire pits

Grounds Keeping and General Maintenance
- Grass not cut and raked often enough in early growth period
- Long wait for repairs that local park staff can not do

6. Mill River Fun Park

6.1 Background

The Mill River Fun Park is now owned and operated by the Provincial Parks System after divestiture by the Western Development Corporation. Operations have traditionally operated at a loss ranging from $60,000 to $20,000 depending on level of wage and capital subsidies contributed by various development agencies. The Fun Park is seen as a employment generator for young people, and an important tourism product for the family market in western PEI. The facility is generally well maintained, but showing signs of age, and needs to present a fresher and modern image. The facility needs additional product enhancements, creativity, and a renewed marketing strategy to reposition itself towards viability.

During the Provincial Parks Review, it became evident when consultations and physical inspections were conducted at the Mill River Provincial Park and the Mill River Fun Park that these components within the total Mill River developments were just that, components of a larger recreation and resort facility. We observed a number of independent, but related activities being undertaken by both public and private sector as separate entities. This investigation also revealed the significant investment in infrastructure has not provided the form of economic and tourism benefits to the community or return to private sector investors which should be anticipated from an investment of this magnitude.

The Mill River Provincial Park, the Mill River Fun Park and the Rodd Mill River Resort encompasses approximately 378 acres of property on the south side of Mill River, PEI. Considerable community, government and private sector investment has been made in the facilities, including:

- an 18-hole championship golf course including an additional par 3 practice/family course available to campground occupants,
- an all season resort with 90 guestroom accommodations,
- food and beverage services,
- squash and tennis courts,
- an aquaplex, spa and fitness centre,
- a seasonal campground with 72 sites,
- playgrounds and shelters,
- a river front with small marina facilities,
- a seasonal fun park,
- winter and summer trails,
- a leisure village and other private cottages,
- operational and maintenance facilities and offices to maintain and operate the park and golf course infrastructure at Mill River and other western parks, and
- adjoining day use park in Bloomfield.

Despite the investment and the success to date at Mill River there is considerable opportunity for growth and further development of a year round recreation and resort destination. When fully developed, the Mill River Recreation Resorts could be an all inclusive Family Recreation and Resort destination.

6.2 Concept Development

The Mill River Recreation Resorts concept builds upon the existing infrastructure to attract more business and clientele to the facility and the area in general by positioning the area's facilities and programs within an all inclusive, all seasons recreation and resorts complex. It attempts to bring synergy and collaboration of existing tourism products within the area by developing a more comprehensive approach to the area's potential. This can be a classic case of the "sum being greater than the parts". (see concept plan in appendix)

Opportunities that should be examined for development include:

- the integration of the Fun Park physically, and from a management and operations perspective with the Mill River Provincial Park;
- the integration of the programs and activities from a marketing perspective with Rodds Resorts;
- redevelop and upgrade the Fun Park:
  - by adding new amenities i.e. outdoor pool, food and beverage, modern play stations,
  - creating a more inviting and visible first impression at the entrance, and
  - removing the empty restaurant facility at the entrance or using the facility for other park purposes.
- determine whether the concept of the Leisure Village provides the highest and best use of this property, and if not, incorporate the already built water and sewage infrastructure into additional recreational vehicle camp sites;
- integration and utilization of the Hernwood School during the months of July and August to accommodate larger convention groups; and
- use the facilities as an adventure centre for the area's all seasons outdoor adventure products and packages e.g. Mill River Marina, kayaking, canoeing, nature trails, bird watching. Lennox Island activities, cross country skiing, snowshoeing, dog races. maple syrup events.

6.3 Next Steps

This is a concept for incremental planned future growth and provides an opportunity for extending seasonal employment for park and resort employees and for new job creation.

Development of this concept will require the participation of many stakeholders including: the tourism industry, Resources West, Rodds Resorts, and the federal and provincial governments. In order to advance the concept, a focus session should be organized with all key stakeholder groups and others who have an interest in the development of the Mill River Recreation Resorts.

The recent success of the major expansion of the Brudenell Resort and the development of the Resort at Crowbush should be examined to determine if this type of development is conducive to expansion and repositioning of the Mill River properties.

The underdeveloped concept of the Leisure Village at Mill River Resort should be reexamined closely to determine if the construction of vacation rental units provides the highest and best use of the property.

Before engaging the stakeholders in a focus group session, a Master Plan that outlines the various proposed uses of the lands and facilities at Mill River Resorts Development should be prepared. This concept plan would form a basis for discussion and further detailed business planning.

Following the preparation of the Resort Master Plan and focus session, a draft business plan for the concept should be prepared. The business plan should provide clear product definition and vision of the Mill River Recreational Resorts, its role as a destination demand generator and its offering of appealing experiences that has a competitive advantage in which a significant number of people are interested.

The business plan should address market opportunities and development, the financial requirements, operational and management strategies, and the role and responsibilities of all the public and private sector entities and phasing to implement the capital components.

7. Confederation Trail

7.1 A Linear Park

The Confederation Trail is a new and integral part of the Provincial Parks System. It offers a new challenge to communities who have adopted a passion for health, recreation and tranquility. Already, the Trail has demonstrated its tourism value with many tour operators taking the opportunity to position the uniqueness of this route as a quality biking and hiking venue to experience a variety of PEI's landscape. Not unlike the other parks, the Confederation Trail offers new challenges to government as owners and managers of a combination community/tourism product.

It is a new challenge for Provincial Parks which up to now has managed only staffed recreation/accommodation sites. Positioning this linear park as an integral part of the provincial vision for tourism will take a much broader approach by government.

Development is continuing with improvements in signage, additional amenities, off-road parking at former station areas. The maintenance program is expanding into preventative programs and silviculture. The Confederation trail now employs over 100 Islanders per year, including students. So how can trail increase its value as a tourism product? The 2001 Exit Survey reveals that 21% (about 200,000 visitors) of all pleasure visitors used the Confederation Trail. Many visitor activities relate to trail usage. Also, camper visitors tend to use the trail more, and undertake more trail-related activities.

Table 8
2001 Visitor Activities

Activity	PEI Visitors	PEI Camper Visitors
Cultural/Historical Attractions	43%	41%
Hiking	22%	30%
Cycling	8%	17%
Bird Watching	20%	22%
Confederation Trail	19%	21%

Indicators for positioning come from all of the above; development, participation, opportunity, landscape, activity. The trail offers an opportunity like no other to showcase and connect the culture and landscape of the province. It can offer cultural product tours in trail communities. It can add railway history as its own cultural product, and the woodlands, wetlands, croplands and pastures with their inhabitants as a province-wide natural product.

The challenge in delivering the products lies in active interpretation, the next layer of development. Research, marketing, literature, signage, community participation and promotion are all elements of bringing the trail to life.

Interviews (349) conducted on the Confederation Trail in Summer, 2001 reveals the majority of Confederation Trail users are visitors, many from Ontario and Quebec, PEI's primary tourism markets, and a significant number were in family groups:

Confederation Trail User Survey, Summer 2001

- Profile of respondents: 60% visitors, 40% local
- Reason for use: 45% exercise, 50% outdoors, and 18% other.
- Age groups on the trail: 17% under 15, 21% between 15 and 30, 45% were between 30 and 50 years, 17% over 50%
- Residency: 38% local, 14% Maritimes, 15% Ontario, 16% Quebec, 2% Western Canada, 15% US
- Awareness of trail: 40% Trail Info guide, 46% friends
- Traveling with: alone 14%, family 60%, friend 25%, Other 1%
- Usage frequency: daily 5%, 1-2 per week 25%, 3-5 per week 6%, mostly first time 42%
- Benefits of trail: 45% privacy, 37% scenery, 11% safety, 8% other
- Possible Improvements: signs, more benches, portable toilets, more information promoting trails, listing attractions and accommodations along the way.

7.2 New Trail Development Project

The Confederation Trail does not quite reach Gateway Village in Borden-Carleton. It stops short of the village at behind Master Packaging, almost 700 meters (0.7 km) from the traffic lights on the main highway. The former rail bed section there is gone, having been used to create the Haul Road through the Borden Industrial Park. Both the Community and the Central Development Corporation support having the Provincial trailhead at Gateway Village.

The project proposed would continue the trail from where it currently ends, along the edge of the right-of-way of the Haul Road to the lights at the highway. Trail users could cross at the lights and use the sidewalks in Gateway Village. Tourism PEI has permission to build it within the road ROW if we stay over to the edge. Conceived is a three-metre wide gravel trail constructed parallel to the road, just in front of the light standards. It would serve the area also as a sidewalk but is not proposed to be paved. Water drainage requirements need to be dealt within the project, involving adding or extending three culverts. Also involved is the addition of a provincial trail gateway - a structure used on the Trans Canada Trail between provinces.

Confederation Trail Gateway Project Cost estimates:

Trail construction, including drainage	**$33,000**
Trail Gateway	**$12,000**
Total project estimate	**$45,000**

In conclusion, the Confederation Trail is already becoming a strong attraction and with more marketing to position it as a tip to tip linear park will also help to strengthen the Provincial Parks System which will enhance shoulder and winter season business, as well as tourism activity in outlying areas.

The Confederation Trail needs:

- A strategic approach to its marketing within the Provincial Parks System
- Proper branding and commitment to linear park focus
- More interpretative and information signing throughout
- More linkages to amenities (accommodations, attractions, food services, retail)
- Value added packages, guided trail expeditions
- Completion to Borden-Carleton

8. Brookvale Provincial Winter Activity Park

Brookvale Provincial Winter Activity Park and Nordic Centre offers a complete range of activities including down-hill skiing, snowboarding, cross-country skiing, biathlon, tobogganing, tubing and ice skating.

At the alpine site, the hill has a 250 foot vertical drop and 10 alpine trails serviced by four lifts - a quad chair, t-bar, platter lift and rope tow. Brookvale provides a ski school and has ski patrols on site to ensure safety during all winter skiing activities.
Throughout the winter there are a number of events scheduled for the outdoor enthusiasts. A new outdoor ice skating rink, winter tubing hill, complete with 5 runs, it's own lift and parking lot and sleigh rides are available to make a fun-filled day of winter activity even better. Brookvale has up-to-date snow-making system and grooming equipment and the trails are lighted for nightskiing. The site offers a full service rental shop which includes down-hill ski rentals and snowboard rentals. As well, there is a food service area.

The Nordic site provides a complete rental shop, lodge, biathlon range and toboggan hill. In addition, there are heated wax huts and the latest in trail grooming equipment making it the destination of choice for cross-country skiing in the Maritimes. There are 24.5 km of groomed recreational ski trails, 7.5 km of competitive trails and biathlon courses.

The Brookvale Winter Activity Park provides winter outdoor recreation opportunities mostly for Islanders. It is ideally located in central PEI, and for the net investment of about $100,000 per annum (2000) during a good snow season, it creates 30 seasonal jobs and is a popular winter recreational venue that benefits many Islanders.

The Park provides much needed winter recreational opportunities for Islanders and visitors. It's summer and fall activity should not go unnoticed. Brookvale hosted the Quebec Biathlon Team in September for dry land training and the site's trails are constantly used for various events such as mountain bicycle races, and general public outdoor recreation.

Depending on snow conditions, the Park costs about $400,000 to operate against $300,000 in revenue making a net investment of $100,000 in public recreation. This net investment can reach upwards to $200,000 during poor snow fall years.

The Provincial Parks Review did not surface any key issues surrounding Brookvale Provincial Winter Activity Park. Considering there are about fifteen different community/recreation based organizations enjoying the Park's facilities throughout the year, there is little evidence that divesting the Park to the private sector would be beneficial to the public good.

9. The Value of Tourism Expenditures Generated by Campers in the Province and in the Provincial Parks System

9.1 The Total PEI Camping Industry Tourism Expenditures

A reasonably accurate determination of the value of tourism generated by the Provincial Parks System would require specific data typically collected within individual parks and the Parks System as a whole. Nevertheless, by utilizing Tourism Exit Survey data, it is possible to develop a proxy estimate of the direct expenditures generated by the total campground industry in PEI and specifically by the provincial park users.

Each year the PEI receives over 1.2 million visitors, of which, about 18% (210,000) are campers. The average size of the camping party is 3.6 persons, thus there were about 58,500 visiting camping parties using all (private and public) PEI campgrounds in 2001. The Exit Survey reveals that the average camping party expenditure by visitors was $648. Thus camping activity by visitors in Prince Edward Island generates about $38 million of expenditures. Provincial Parks statistics tell us that residents represent 26% of camping parties. We would conservatively estimate 20% of campers in PEI campgrounds are Islanders, thus there is an additional 12,000 resident camping parties. (Private campgrounds have a higher percentage of visitors). Residents would likely make minimal expenditures – fees, automobile fuel and "snacks" – in the order of say $250 per party. This would result in another $3 million in in-province expenditures. For both visitors and residents, this would result in estimated total spending in PEI of about $41 million in the province by all campers.

9.2 Provincial Parks Expenditure Impacts

The Provincial Parks System sold almost 39,000 site nights in 2001. The average length of stay was 4.85 nights, thus 6,000 visitor parties and about 2,000 resident parties used the Provincial Parks System. Thus, the Provincial Campgrounds generated $4 million in non-resident expenditures and $.5 million in resident expenditures for a total of $5.5 million in direct expenditures.

In addition to campground use, the Provincial Parks system consists of day use parks and built attractions at Mill River, Basin Head, Kings Castle, and Brookvale. Tourism and resident expenditures arising from use of these facilities consist of fees, and associated travel expenditures. Attendance numbers at day use parks are not tabulated, however, other studies reveal that for every campground user, there are upwards to 10 day park users.

For these estimates, we will conservatively assume a 2:1 ratio of day use park users for every campground visitor; thus another 12,000 day use visitor parties frequent day use parks.

Reasonable approximations of per party expenditures in PEI by visitors in day use parks would be about $250. Therefore, another $3 million in expenditures can be attributed to visitors in day parks.

In summary, the provincial campgrounds generated $4 million in non-resident expenditures and $.5 million in resident expenditures for a total of $5.5 million in direct expenditures. The day use parks generated another $3 million in direct visitor expenditures. Therefore, the direct expenditure value of the Provincial Parks System to the province is very significant – about $8.5 million.

The Provincial Parks System forms a small, but significant part of the total PEI campground industry. We estimate the provincial system represents about 20% of the total campground visitor expenditures. When the spin-off benefits and other rounds of spending created by tourism activity is considered at a multiplier of 2.0, it can be readily concluded that the Provincial Parks System's $1.5 million net investment directly returns at least 11 times.

When we factor in the total campground industry and the role the provincial parks system plays in positioning camping as an integral part of the province's total tourism product, the $1.5 million net investment returns over 25 times its value. This demonstrates the Provincial Parks system is an important component of the tourism product and the provincial economy.

10. Future Trends in Outdoor Recreation

A literature review of outdoor recreation trends reveals:[2]

Trends

- Travel is still very much a part of American's outdoor recreation
- Trends show continuing growth in view/learning recreation, accelerated growth in use of trails, strong interest in motorized activities, and continued participation in water and snow activities
- The number of people engaged in outdoor recreation in the East is three times the number in the West
- As demographics continue to change and as generations come and go, so too will the nature of outdoor recreation
- One market segment stands out, the *"Enthusiasts"*, who account for 60 to 90 percent of all participation days across activities
- As in 1960, outdoor recreation continues as a major part of Americans' lifestyle
- But some things have changed:
    - Birding, hiking, off-road driving, camping, and skiing participants grew at much higher rates than population
    - Hunting, horseback riding, sailing and fishing have grown slowly
    - Bird watching grew fastest of all activities tracked
- Equipment technology; rising popularity of risk/adventure; changing demographics; and rising incomes are shifting outdoor market
- These market shifts are driven by population growth, immigration, ageing, population diversification, income growth, rising leisure, cheap gasoline, and changing opportunities
- Of the 10 most popular activities, 4 focus on viewing and learning

Shifts

- The average outdoor participant is changing; fewer high school educated, earn <$25K income, from large households; more college educated, earn >$50K, from other races, and smaller households
- People are remaining active in their chosen activities longer in life
- Working parents mixing recreation with business travel, bring family along
- Increasing support for "green" travel
- Resurgence in interest in family travel
- Use of RVs booming

[2] Trends 2000, Outdoor Recreation: An American lifestyle Trend, US Forestry Service

Table 9
Activities Rising Fastest by Percentage (1982-2000)
(16 or older)

Activity	% Growth
Bird Watching	236%
Hiking	196%
Backpacking	166%
Snow-Mobiling	108%
Walking	91%
Off-road driving	89%
Primitive camping	82%
Developed camping	76%
Downhill skiing	67%
Swimming/river, lake or ocean	64%

Table 10
Activities Adding the Most Participants (1982-2000)
(16 or older)

	Millions	
Activity	Growth	No. in 2000
Walking	85.4	179.0
Bird Watching	50.0	71.2
Hiking	48.4	73.1
Swimming/river, lake, or ocean	36.4	92.9
Sightseeing	32.7	114.0
Picnicking	31.8	116.6
Bicycling	27.4	83.9
Developed camping	22.8	52.8
Motor boating	17.8	51.4
Off-road driving	17.3	36.7
Backpacking	14.6	23.4

11. Provincial Parks Review – Recommendations for a Sustainable Future

The consultants have the following recommendations that have evolved from the review of the Provincial Parks System. The research and consultations effort behind this report is significant. Our conclusions are based on up-to-date, thorough information. Our goal is to be proactive in expressing what we believe would be a sustainable future for the Provincial Parks System – a future that encompasses the vision of those who creatively designed and built the system and a continued strengthening of Islanders and visitors appreciation and support of the parks.

The review did not just consider the current situation of Provincial Parks. It also examined past management practices, and looked to the interests of future generations while protecting the natural values contained in the Parks. We also considered the role Provincial Parks play in the health and wellness of Islanders and the impact non-resident visitors make to the Island economy.

11.1 Conclusions

Our fundamental belief is that like health and education, parks are an essential government responsibility. Parks play an integral role in a citizen's sense of identity, well being and place. They are an important part of our culture and are enjoyed by all demographic groups. Parks are a public trust and must be provided proper support. Some basic conclusions guide our detailed recommendations. These conclusions are:

- ✓ The Provincial Parks System was created with vision; strategically located throughout the province, high quality camping, beach, nature and recreation experiences are available.

- ✓ The Provincial Parks System has a vital role in providing:

  - residents with outdoor recreation opportunities and a "place to go" to enjoy nature, and
  - visitors with an assurance of an initial high quality base from which to further explore the Island's attributes.

- ✓ The Provincial Parks System has experienced significant and increasing levels of visitation.

- ✓ The Provincial Parks make a net investment of about $1.5 million, which bring valued recreational opportunities to the public and substantial indirect and spin-off tourism benefits.

- ✓ The Provincial Parks System has been neglected for too long; it needs significant capital, management, structural and operational improvements.

11.2 Mandate

There is no legislated or written mandate, or mission statement for the Provincial Parks System. Most parks are multi-purpose: recreation, education, preservation, tourism and interpretation. The majority of parks serve a mix of resident and visitor users, whereas a few cater mostly to local residents.

Provincial Parks attract much public attention. In the past, it was assumed that parks would be managed to provide public recreation opportunities. Now there is an added expectation that parks will be managed to conserve a broad range of ecological values.

Tourism PEI is currently finalizing a three-year strategic plan. A mission statement and Parks System goals and objectives should build on and compliment the mandate, values and principles articulated in the Tourism PEI Strategic Plan. A primary objective of the Tourism PEI Strategic Plan is promoting and developing provincial facilities as centres of excellence. These recommendations are directed towards that goal.

Recommendation #1:

The Provincial Parks System should articulate a mission statement to clearly define who the system serves, why it exists and what functions it performs.

A recommended Mission Statement appears below:

The Provincial Parks System develops, maintains and operates, for the benefit of residents and visitors, a network of quality parks and facilities in Prince Edward Island that:

- ***preserves natural areas;***
- ***provides opportunities for outdoor recreation, conservation, and education;***
- ***promotes a healthy lifestyle through the active use of green spaces, beaches, and trails;***
- ***functions in close cooperation with the Island's communities and the tourism industry; and***
- ***enhances the care and appreciation of the natural environment.***

11.3 Parks Planning, Classification and New Parks Development Policy

The Provincial Parks comprise a broad spectrum of quality environmental and cultural resources serving a variety of purposes. There are currently no park management plans, statements, or policy direction to guide the management and development of the individual parks or the Provincial Parks System as a whole. There is also a lack of a natural resource assessment process. Each park management plan should provide long-term goals and objectives of a particular park, as well as its role in the Provincial Parks System.

Recommendation #2:

The Provincial Parks System should prepare individual park management plans for all existing parks and for any new parks being proposed. The development of these plans should incorporate input from organizations such as the Island Nature Trust, TIAPEI, the neighbouring communities, and the general public.

Park management plans are based on information collected by many sources including biologists, foresters, geologists, archeologists, historians, other resource scientists and managers, as well as the general public. There may be up to seven stages in the preparation of a park management plan. These stages may vary from park to park, depending on the significance of park values and the complexity of issues. Some stages may be combined in the case of a simple, straightforward plan. For all plans, public participation is encouraged from the start and should continue throughout the process.

Other types of plans to be considered include:

Resource Management Plans, to provide direction for:

- Heritage Values: rocks, fossils, landforms, plants, animals, ecosystems, sacred places and historical sites.
- Recreational Values: backcountry, trails, campsites, canoe routes, beaches, vistas and boating.
- Research: Visitor surveys, carrying capacity, data collection, scientific research.

Operating Plans, to provide direction for:

- Visitor Services: public information needs, education, interpretive themes, recreation skills programs. creation Activities: user quotas, permitted uses, activity restrictions.
- Commercial Tourism: camping cabins, roofed accommodation, concessions, tours, adjacent activities and tourism product offerings, access to resources.
- Marketing: park promotion, market research, user surveys, merchandising.

Development Plans, to provide direction for:

- Buildings and Facilities: design, engineering, materials.
- Utilities: electrical, water, sewage, solid waste disposal.
- Site Planning: location, esthetics, landscaping, aggregates, access (roads, paths, trails).

Recommendation #3:

The Provincial Parks System should adopt a park classification scheme to categorize and clarify the role and mandate of each park, from the perspective of their natural attributes and their users and to provide a management framework for the Provincial Parks System.

A recommended classification scheme follows:[1]

1. **Natural Environment Parks** (candidates include Basin Head, Cabot, Cedar Dunes, Green Park, Strathgartney and Confederation Trail)

   Objective

   Good natural lands and historic resources to educate and acquaint the user with the aesthetics and values of natural landscapes with associated compatible forms of recreation.

   Selection Criteria

   - Contains one or more examples of the province's natural features in such areas as: geology, biology, ecology, etc.
   - Provides a variety of representative natural themes in each of the province's 3 geographic regions.
   - Boundaries should be dependent on the characteristic and extent of the natural feature(s) being contained.

   Management Philosophy

   - Visitation levels shall be established (site specific) to ensure maintenance of natural aesthetics and landscapes.
   - Vegetation and other natural elements shall be replaces and/or nurtured as required to maintain the natural landscape.

[1] This proposed classification scheme is adapted from the 1974 document: Classification of Provincial Parks in Prince Edward Island prepared by the Parks and Resorts Branch, Department of Environment and Tourism. This classification formed the basis for the design of the Provincial Parks System. Thanks to Ernie Morello, a member of the Provincial Parks Planning staff at that time for a copy.

Development
- Minimal facilities shall be utilized to sustain the atmosphere of the park.
- Interpretive programs shall be based on the concept of natural themes for the orientation and education of the user.

2. **Recreation Parks** (candidates include Kings Castle, Brookvale, Pamure Island, Northumberland, Lord Selkirk, Campbell's Cove, Red Point, Linkletter, and Jacques Cartier, and Brookvale)

Objective
Areas that are adaptable to intense visitor use and offer a wide range of outdoor recreation opportunities.

Selection Criteria
- Located in proximity to resident and travelling tourist populations.
- Landscape character, durability of the site for intensive use, and number of use opportunities.
- Sufficiently large to provide a wide variety of recreation uses.

Management Philosophy
- Recreational events and interpretative programs shall be emphasized.
- Modern conveniences shall be provided to meet intensive user demands.
- Natural zones within the park shall have a reduced level of facilities in keeping with its local atmosphere.
- A complete range of resource management programs (water, wildlife, vegetation, and landform) shall be encouraged, consistent with objectives established for individual areas.

Development
- All development shall exist within the recreation and service zones.
- One activity may be allowed to dominate the area, if the site is so oriented. A wide variety of activities, however, shall exist at most parks.
- Types of facilities shall be limited to supporting only non-urban natural type of recreational experience.
- Special design considerations shall be given to users who are physically challenged.
- Recreation programs may be delivered in this class of park.
- Group use of facilities shall be encouraged.

3. **Wayside and Beach Access Parks** (candidates include most Day Use Parks)

Objective

Safe, relaxing areas and facilities at reasonable intervals for motorists to stop and rest and for local residents to enjoy outdoor recreational opportunities.

Selection Criteria

- Sites that are attractive in themselves and, where possible, provide scenic views.
- Adjacent to but screened from the highway to give the user a feeling of detachment during his stop.
- Sufficient area to accommodate the minimum use of facilities and planned use.
- The beach area must be of a suitable quality to adequately support recreation use at an intensity level that justifies development of an access roads and facilities.
- Beach backup land should be aesthetically pleasing and free from adverse private development.
- Lands between beach areas and main travel routes must be capable of supporting access road development.

Management Philosophy

- The wayside and beach shall be maintained in a clean and attractive state.
- Wayside lands shall be landscaped with neatly mowed, litter-free grounds.
- Activities shall include: parking, picnicking, resting, utilization of rest rooms.
- Camping shall not be allowed.

Development

- Facilities shall be in adequate number and design to meet the demand of each selected site.
- Minimum facilities include: washrooms, parking area, refuse containers, picnic tables, drinking water, public information.
- Located as necessary along major provincial highways at high intensity tourist traffic routes to accomplish desired purpose.
- Beach assess shall be limited facility investment.
- Beach access area shall be of an area great enough to maintain the natural physical integrity of the area and sustain anticipated visitation levels.

4. **Resort Parks** (candidates are Brudenell and Mill River Resorts and campgrounds)

Objective
A consolidation of the wide array of the tourism and recreation plant at these resorts to deliver a seamless resort product.

Selection Criteria
- Multi-purpose tourism product offerings are available at these sites.
- Significant public infrastructure investment has been made and significant staff resources are made available to these sites.
- The east and west locations of these resort parks support strategic positioning for anchor and cluster developments.

Management Philosophy
- Provide strong decentralized on-site management and operations leadership.
- Present a seamless product to the customer.
- Present a wide variety (cluster) of tourism recreational opportunities with strong branding targeting the site on specific markets.
- Avoid duplication and overlap of operations and maintenance functions within each park element.
- Provide independent financial controls, operations performance measurement and accountability.

Recommendation # 4

The Provincial Parks System should consider the development of new parks only after it reinvests in the revitalization of existing parks. When considering new park development, strong support and involvement from the local community should be evident and the planning process should be guided by the classification scheme outlined above.

11.4 Natural Values of Provincial Parks

The Provincial Parks System makes an important contribution to protecting our natural heritage. The key natural values and examples of Provincial Parks which represent these values are presented below:

Ecological Representation. For example, Strathgartney Provincial Park includes an excellent representative of upland hardwood forest. Cedar Dunes Provincial Park includes a provincially unique eastern white cedar stand growing on sand ridges. Brudenell Provincial Park includes an excellent example of an eastern white pine stand.

Endangered Species Protection. Examples: Jacques Cartier, Cabot Beach and Souris Beach Provincial Parks provide nesting habitat for the endangered Piping Plover.

Maintenance of Biodiversity. At the community level, maintenance of diversity is similar to ecological representation - Parks maintain unique communities within the Island landscape. At the species level, Parks can host organisms that are not found anywhere else on PEI. For example, the very rare Braun's Holly fern is only known from a single location in Bloomfield Provincial Park.
At the genetic level, Parks can be seed source reservoirs for uncommon species such as black ash or disease-resistant individuals of beech.

Scientific Benchmarks. Parks and other types of protected areas can be excellent study sites for ecological research and for measuring changes in the island landscape and environment. It is important to note that we do not have adequate biological inventories of PEI's Parks. For example, the Holly Fern was not known to exist in PEI until Island Nature Trust found it in Bloomfield Provincial Park in 1999.

Some Parks include portions designated under the Natural Areas Protection Act. While this legal designation allows visitor use of the area (bird watching, trail walking, picnics, etc), it restricts certain activities and development. Parks with designated areas include Basin Head, Brudenell, Cabot Park, Cedar Dunes, Green Park and Strathgartney.

Island Nature Trust has recommended that an additional section of Brudenell Provincial Park and part of Bloomfield Provincial Park be designated under the Natural Areas Protection Act. This recommendation has been accepted by Tourism PEI, and designation documents have been prepared for review by the Natural Areas Protection Act Technical Advisory Committee. Parks such as Mill River and Brookvale have natural habitats that may qualify for Natural Areas status in the future. Parts of the Confederation Trail traverses through important habitat. Finally, some parks are also recognized under other legislation. For example, Brookvale Provincial Park is a provincial forest.

Recommendation #4:

The Provincial Parks System should conduct a review of the natural values in all parks with a view to identify, inventory and protect sensitive areas and endangered species. Any future park development should ensure the preservation and maintenance of significant natural values.

Recommendation #6:

The Provincial Parks System should identify and commission an organization and/or individual, with expertise in the natural sciences, to provide guidance and advice in preserving and promoting the natural values of the parks by means of increased interpretation and natural education programming.

11.5 Community Relations and Communications

The Provincial Parks System has not responded well to communities, park committees and stakeholder groups. Consultations, undertaken as part of the present study, with various parks committees and community groups have revealed that park management staff pay insufficient attention to many matters deemed important by park users and adjacent communities impacted by park activities. Various park committees have been active in supporting park activities and improvement projects such as grounds beautification, facility maintenance and special events. However, their inability to influence overall parks policy, as well as resolve minor parks maintenance and repair issues has created local apathy and frustration, resulting in a negative environment. Consequently, there is little local appetite for new policy initiatives, new programming partnerships, and, particularly divestiture due to the lack of a firm foundation for encouraging enhanced community involvement.

Recommendation #7:

The Provincial Parks System should improve on-going communications with neighbouring community stakeholders, parks groups and the tourism industry by encouraging the establishment of parks committees, where desirable. In this way, formal relationships and/or partnerships would foster more direct involvement in parks activities, operations and business planning. Senior parks management should hold meetings and consultations with park committees especially prior to the season opening and subsequent to the season closing.

The lack of communications has also surfaced with regard to culture, heritage and tourism attractions adjacent to a number of Provincial Parks. There are a number of Provincial and community museums, and commercial operations in close proximity to Provincial Parks. Much synergy could be gained by cooperative master planning, programming, marketing or management policies (e.g. similar opening and closing hours) to present these attractions and adjacent parks in a coordinated manner, particularly when theses facilities are both operated by the Provincial Government or one of its agencies such as the Prince Edward Island Museum and Heritage Foundation.

Examples of joint product offerings that have collaborative opportunities include:

- Green Park and Green Park Shipbuilding Museum and Yeo House;
- Cedar Dunes Provincial Park , West Point Lighthouse Museum and Harbourside Developments;
- Jacques Cartier Park and Alberton Museum;
- Mill River Provincial Park, Mill River Fun Park, Golf Course and Rodds Resort;
- Cabot Park, Historic School House, and Emily of New Moon Site;
- Linkletter Provincial Park and Summerside Waterfront "West End" Developments;
- Strathgartney Provincial Park and Strathgartney Homestead;
- Union Corner Day Use Park and Union Corner School House Museum;
- Victoria Day Use Park and Victoria Seaport Lighthouse Museum;
- Lord Selkirk Provincial Park and Orwell Corner Historic Village;
- Parmure Island, PEI Native Council, and Steele Homestead; and
- Basin Head Day Park and Basin Head Fisheries Museum.

Recommendation #8:

The Provincial Parks System should identify opportunities for collaborative efforts with provincial museums and other local public/private attractions to benefit mutual operations and provide a seamless, value-added experience for residents and visitors.

11.6 Divestiture of Parks

The divestiture of some Parks within the Provincial Parks System in order to focus Provincial efforts (and finances) on a reduced parks inventory was considered and discussed during the study process. There are obvious candidates for community or private sector involvement in management of parks, particularly those with high levels of resident involvement as well as Parks that are adjacent to municipalities. (The latter parks include Kings Castle, Souris Beach Day Park, Victoria Day Park, and Belmont Day Park.) Campgrounds with high levels of resident use (over 40%) include: Lord Selkirk, Cedar Dunes, Jacques Cartier, and Mill River. Where there are high levels of resident use in parks, community interest is typically directed towards influencing parks policies or maintenance decisions. In all cases, active community involvement will require building a positive working relationship with interested park stakeholders that can lead to positive partnerships and collaborative efforts geared towards building potential for divestiture.

The consultation process did not reveal much interest or appetite for community or private sector ownership of parks.

The reasons for this vary from park to park, including:

- little understanding by the community of the park's operations, visitation and financial circumstances;
- frustration with lack of local influence, which could be channeled into more productive and cooperative activities;
- municipalities such as Souris and Victoria are financially stretched with their existing operational challenges; thus, taking on another maintenance burden is not deemed to be in the community's best interest;
- weak understanding of any benefits that could accrue from community involvement in a local Park; and
- the volunteer base in communities is becoming fatigued, and leaders are concerned about their ability to maintain a committed Board of Directors to manage a divested park.

Recommendation #9:

The Provincial Parks System should examine the surplus/deficit position and natural values of each individual park, and its contribution to the total parks system in order to determine if divestiture is advantageous for certain parks. A potential divestiture program should identify parks with good potential for local participation, establish guidelines for divestiture, and provide a financial incentive to communities or the private sector to assume individual park operations.

In 1991, the Provincial Government accepted the World Wildlife Fund Endangered Spaces campaign and set aside 7% of its land for wildlife. Provincial Parks were included in the government's calculations of protected areas. Therefore, any divestiture of parks should be discounted from the Provincial total. If divestiture is considered for areas with no significant natural values, it must be considered carefully in light of the 1997 Report of the Roundtable on Resource Land Use and Stewardship, which states:

We recommend that the Department of Economic Development and Tourism conduct a public review of Provincial Parks, and that it consult with residents of affected communities and the Island Nature Trust prior to divesting itself of any parks property. (P.139, recommendation #79).

We recommend that Government establish a "no net loss" policy for Provincial Lands and the present level of 9.2% of the province's land area be established as the minimum. (P.143, recommendation #84).

Recommendation #10:

The Provincial Parks System should, through the Government of PEI, maintain ownership of its parks. Any divestiture of provincial parks should be operational in nature (e.g. management contracts, long-term leases, community-based operations, etc.) and not include deed transfer.

11.7 Human Resources

Parks are organized along Eastern and Western Divisions, each with a Supervisor and administration offices, located at Brudenell and Mill River, respectively. The East and West Regional Operations are essentially maintenance depots, with administration and program coordination services provided from the East and West Divisions offices. Mobile maintenance crews operate out of each Division providing grass cutting, repair and maintenance services to day use and campground parks in the region. In addition both East and West Divisions have Program Coordinators, who design program activities and provide leadership to programs personnel in each campground park. A Surf Guard Supervisor is responsible for the coordination of surf guard services at various beaches throughout the Parks System.

Each Park has a Park Officer, who is responsible for the operation of the park and supervision of internal Park Workers and maintenance operations. Park Officers have no direct involvement with (or responsibility for) hiring of personnel, program delivery, or procurement of materials and supplies. The job description for Park Officers identifies the primary duty as maintenance, followed by security, supervision of personnel, and customer relations. Each campground park is staffed with a minimum of six Park Workers plus a Parks Officer. In addition, most day use parks have a Park Worker providing maintenance services. Basin Head, Kings Castle and Mill River Fun Park hire additional personnel to support activities at these locations.

There is also a central purchasing and stores activity located in Charlottetown, which provides the total parks system with purchasing services, supplies storage and delivery. Each park uses up to $5,000 of supplies per season. About $25,000 of this supply is purchased through tendering processes. This office also provides delivery services to various Visitor Information Centres.

Human resources issues in the Provincial Parks System include:

- decision making, even for insignificant matters is highly centralized;
- Park Officers, perceived as managers by the park users and the community, lack the delegated authority to make park operational decisions;
- maintenance, not parks management, dominate the activities of the East and West Supervisors;

- interpretative programming is not well integrated with general parks operations;
- park staffing priority has been to provide employment with a specific allocation given each park. This restricts flexibility to allocate staff resources according to user volumes, parks' activity, park size, and maintenance demands; and
- strategic and business management is lacking.

Recommendation #11:

The Provincial Parks System should allocate the number of Park Workers as required throughout the system to accommodate park user volumes, activity, size, operations and maintenance demands. Operating with a flexible hiring policy, certain parks can open earlier and close later while managing the same number of work-weeks within the employed group.

Recommendation # 12:

The Provincial Parks System should enhance the training of Park Officers in order to empower them with more responsibility, authority and accountability of the day-to-day management issues, procurement, operations, and programs at the park level. This may require reclassification of the Parks Officer position to a higher standard (Parks Supervisor) within the PEI Public Service.

Recommendation # 13:

The Provincial Parks System should rewrite position descriptions of all its employees, instituting increased standards for entry and placement. For existing employees develop a training program designed to meet the higher job requirements and standards.

Recommendation #14:

The Provincial Parks System should review the central purchasing concept and function to determine the feasibility of allocating each park with a budget to directly procure cleaning and maintenance supplies, small tools and essential consumables through local purchase orders.

11.8 Organization Structure

The organization structure of the Provincial Parks system is characterized by the following:

- lack of decision making authority and accountability at the park level,
- lack of delination between east/west mangement and central headquarters management responsibilities,
- heavy emphasis on maintenance, and less on operational issues,
- weak delination between administration/finance and operations and maintenance,
- little involvement in programs at park management levels,
- no financial reporting or analysis by parks or other park elements such as east and west, and
- lack of performamce measurements.

Recommendation # 15:

The Provincial Parks System should undertake a management reorganization to address a number of Parks System issues identified during the review process. The reorganization should address the following:

- **provide a 5 to 6 person leadership team seperated along functional lines reporting to the Provincial Parks Manager. Management experience and expertise in finance, parks operations, programing and maintenance is required;**
- **build more financial management and accountability into the system by establishing a dedicated financial management function within the Parks System;**
- **give higher priority on park operations policy and programing at headquarters;**
- **encourage more operational and maintenance decisions to be moved closer to the parks level;**
- **supervisors in east and west place emphasis on maintenance, and less on operations and programing;**
- **reduce the number of subordinates reporting directly to the Provincial Parks Manager; and**
- **permit the Provincial Parks Manager to place greater emphasis on strategic and financial management, marketing and community relations functions, and less on day to day maintenance and operational issues.**

Recommendation #16:

The Provincial Parks System should reallocate its staffing resources to create two new positions; namely a Finance Officer and Manager of Operations and Programs.

Recommendation #17:

The Provincial Parks System should direct more of its senior management time and effort to strategic planning, human resource development, revenue generation, cost management, marketing and overall operations policy.

11.9 Revenue Initiatives, Financial and Cost Management

The Provincial Parks financial management system forms part of the total Tourism PEI budgetary management process. The Provincial Parks are funded through the Tourism Department's budget process, and operating expenditures are paid from the department's budget allocations. Unlike PEI Golf Links Inc., a Provincial Crown Corporation, the Parks System does not retain park revenues within the Parks System. All revenues are remitted to the provincial general revenue account and each year park expenses are funded through the normal government budgetary processes.

This process does not encourage cost-recovery, revenue enhancement or expense cutting measures, nor does it influence enterprising management approaches within each park or the parks system as a whole.

An important part of parks financial management surround cost recovery and new revenue enhancement measures. New potential revenue sources are Day Use Park fees (Basin Head, Chelton Beach) park concessions, confection stores, leases from land development on parks lands, camping cabins developments and golf driving ranges at larger parks (e.g Red Point and Cabot).

Revenue initiatives must respect the following principles:

- Revenue initiatives will continue to respect the mandate and integrity of the Parks System.
- Any revenue generation will never be adequate to replace significant portion of appropriations thus revenues earned must safeguard existing budgetary allocations to the Parks System.
- Public appropriations should continue to form the core of support for the system, covering long-term stewardship of the parks. User fees should be applied to the costs of services and facilities to serve the immediate needs of park users; however they will never be sufficient to cover all such costs.

- Revenue must be retained within the system, and where individual park initiatives are sought, revenue should be reinvested in the park where it was earned.
- Prices for entry, services and programs should be linked to the fluid marketplace and maintain an appropriate relationship with the prices of comparable services within the local marketplace.

The following conclusions regarding revenue generation should guide the future of the Provincial Parks System:

- Although a business model should be a foundation for the system, financial administration must be based on principles that are driven by the vision for the system and mandate of the Provincial Parks System, rather than just the need for revenue generation within parks.

- A business-like approach with revenue retention has the potential to provide improved financial certainty and flexibility, including the ability to connect business and management plans to budget performance for parks.

- Park users and the members of the public who appreciate parks should not be regarded as mere customers, and the park system that is a public trust should not be treated as a product just to be sold to the public.

Recommendation # 18:

The Provincial Parks System should seek new revenues from strategic locations. New potential revenue sources are high volume day use parks (e.g. Basin Head, Chelton Beach) where lifeguard and unique park services are available. Park concessions, confection stores, leases from land development on parklands, camping cabins developments and golf driving ranges at larger parks (e.g Red Point and Cabot) should also be considered.

Recommendation # 19:

A fundamental principle guiding a revenue policy should be that tax dollars pay for the cost of establishing, protecting and maintaining Provincial Parks, and those who use them should pay for any additional personal or commercial benefit they receive.

Recommendation #20:

The Provincial Parks System should retain revenue generated through sales, permits and fees to make a significant contribution to the park system, in keeping with business management principles. Arrangements should be made with Treasury Board for revenue retention. The revenue should be reinvested in the operations, maintenance and development of the Provincial Parks System.

Recommendation # 21:

If additional fee systems are established, 'disadvantaged' groups or individuals should not have their access to a provincial park limited because of inability to pay.

Recommendation # 22:

A combination of annual and day permits/passes should be considered, and consideration should also be given to a resident and non-resident fee differential.

Recommendation # 23:

The Provincial Parks System should develop individual park business plans, which comprise, at minimum, annual objectives, operations and programming plans, budgets, and performance measurement indicators. Each park should be measured as a separate enterprise with individual accounting and financial/operations statements. In this way park performance can be measured against other parks' operations, and with overall Parks System standards. Also, if desirable, independent park's operations and financial information can be used to generate community and/or private sector interest in divestiture.

Recommendation #24:

The Provincial Parks System should prepare an Annual Business Plan that consolidates individual park business plans and provides performance standards and measurements on a system wide basis.

Recommendation # 25:

The Provincial Parks System should examine the potential for contracting out maintenance services for grass cutting, building and facilities maintenance and janitorial services in order to effect cost savings and support local businesses.

11.10 Marketing

Market Planning and Marketing

The responsibility for marketing the Provincial Parks has been shared by various parks management personnel, most who have little or no experience in developing market plans, promotion, advertising and sales. There is no annual market plan prepared for the Parks System, and marketing budgets are hidden within promotions of programs at the parks level and in general operational budget allocations. The Marketing Division of Tourism PEI who support the marketing and advertising campaign for the Provincial Government has no mandate or responsibility to market Provincial Parks. This Division, in concert with the Tourism Marketing Authority is responsible for a $4 million budget that promotes tourism visitation to Prince Edward Island.

Key issues surrounding marketing of the Provincial Parks System are:

- lack of a clear responsibility centre and budget line in the Parks System;
- annual market plans need to be prepared;
- research associated with the development of a market plan is required, e.g. Quebec market represents excellent market opportunities given their high visitation levels in Provincial Parks;
- existing statistics and surveys (e.g. Exit Survey) are not used;
- product definition, positioning, and branding required of Provincial parks;
- relationship marketing needed with the Confederation Trail;
- entrance signs to parks lack visibility and profile; and
- directional and internal park signs lack visual consistency, and many are tired and worn out.

Recommendation #26:

The Provincial Parks System should allocate a dedicated budget ($150,000) for marketing and request assistance from the Marketing Division of Tourism PEI and the Tourism Marketing Authority to integrate the marketing of Provincial Parks within the total Provincial Tourism Marketing Plan. The Provincial Parks Marketing Plan should:

- **utilize research available from this study,**
- **on an annual basis, use special data runs on parks and campgrounds available from the Tourism Exit Survey,**
- **conduct regular park surveys and additional market research,**
- **define the parks product, its market position relative to other provincial tourism products, and develop a new revitalized brand for the Provincial Parks;**

- **establish relationship marketing, and seek consistency with the Confederation Trail marketing efforts;**
- **upgrade and standardize entrance signs to parks for better visibility and profile; and**
- **modernize directional and internal park signs.**

Reservation System

Currently, the Parks System reservation system is a manual system with limited capability to meet operational requirements. The reservation service handles phone calls, faxes or mail from the visitor using parks employees. However implementation of the reservation policies is not consistent from Park to Park.

Tourism PEI's Strategic Plan outlines the benefits of a central reservation service using improved technology. Park reservations could be an integral part of a Provincial reservation system.

An effective parks reservation system would:

- better manage supply and demand;
- support sales and marketing practices;
- better manage visitor service i.e. line-ups, preferred site selection;
- extend the use of campgrounds to travelling visitors;
- assist park employment strategies during peak and shoulder resource requirements; and
- provide a user-friendly way to balance supply and demand objectives.

Strategic objectives of a new, modern reservation system should be to:

- provide improved and convenient service to visitors by allowing them to pre-plan their trips to Provincial Parks;
- provide a tool to enhance management and marketing programs through the collection and maintenance of visitor statistics and information databases;
- collect and analyze campground use data and statistics and visitors opinion related to campground reservations and system; and
- integrate the system with other means of making reservations via a centralized toll-free telephone and Internet based system, linked into each park and Visitor Information Centre.

Recommendation #27:

The Provincial Parks System should conduct a review of its reservation system and policies with a view to modernize the reservation service within an overall central reservation system.

11.11 Capital Improvements

Each year, Tourism PEI seeks budget allocations from the Provincial Department of Transportation and Public Works for capital improvements in the Parks System. Over the last three fiscal years, allocations for capital averaged about $150,000 per year.

The Physical Conditions Report prepared by James C. Johnson Associates Inc. outlined capital improvement requirements totaling $4.1 million over the next 5 years.

Required Capital Improvements		
Immediate requirements	**$1,735,800**	
1– 5 years	**$2,371,200**	**Total $4.1 million**
5 – 10 years	**$1,389,000**	
Total	**$5,487,000**	

Much of the capital improvements identified are facilities replacement and extensive repairs (see appendix). Of immediate concern is the requirement for improvements in water and sewage treatment facilities in Northumberland, Cabot and Linkletter Parks, and wheel chair inaccessibility in many parks.

Recommendation # 28:

The Provincial Parks System should receive a special allocation of $1.5 million in 2002/2003 for immediate and critical capital improvements that are designed to meet basic health and safety issues, barrier free accessibility and upgrade the general appearance and functioning of the parks' facilities. Subsequent capital improvement requirements in the amount of $500,000 per annum should be allocated.

Accessibility for physically challenged citizens is a major issue in Provincial Parks. The consultants identified the need for barrier free washrooms in most parks. Six parks have inaccessible washrooms, and another eight require washroom upgrades that will need to be barrier free. It was noted by the Steering Committee that building new washrooms and shelters slab-on-grade rather than on posts would alleviate wheel chair access problems.

Recommendation # 29:

The Provincial Parks System should give immediate priority to making its facilities barrier free. Building on grade rather than on posts would alleviate some barrier challenges. In addition, building accessible equipment and facilities (swings, trails and boardwalks to beaches) is recommended.

The levels of services at individual campsites in Provincial Parks are much lower than at private sector park sites. Only fifty percent of Provincial campsites are serviced, compared to 74% of private sector campgrounds. Forty eight percent of private sector campground sites are 3W verses only 19% in provincial campgrounds.

Recommendation # 30:

The Provincial Parks System should upgrade unserviced campsites to 3 way status, and upgrade/repair existing 2 way and 3 way sites before contemplating the development of additional 4W and 5W site services.

11.12 Buffaloland Provincial Park

The Buffaloland Provincial Park located about 6 km from Montague has been in operation since 1970, when the original bison herd was brought in from Elk Island National Park in 1970. Presently, the herd is maintained at about 20 animals, and surplus animals are removed every year or two and the meat sold.

The Provincial Parks System contracts the feeding and care of the herd, and in 2000, about $9,000 was spent on feed and veterinary services. In addition, Provincial Park maintenance personnel, maintain fencing and pasture lands. In addition to the Buffalo, white-tail Deer acquired from the Kings Castle Provincial Park (Fantasyland) are held in the compound The only building in Buffaloland Park is a storage barn capable of storing hay and feed supplies. There are no public facilities except for an elevated viewing station and 2 outhouse toilets. The fence enclosure is about 30 years old, has been well maintained.

Visitation statistics at Buffaloland are not readily available, as there is no seasonal staff person on site on a daily basis. It is felt that families with young children typically visit Buffaloland. The Southeast Environmental Association commissioned a study by ABS Ventures, called "The Milltown Cross Project" early in 2001. The study concluded the natural resource base in the Harvey Moore Wildlife Management Area and Buffaloland Provincial Park, plus related natural attractions in adjacent properties and the region offer a "world class nature and heritage experience".

The study outlined a series of development and management options that would facilitate community ownership and involvement in the "Harvey Moore Centre at Milltown Cross". Consultations with provincial officials and the communities reveal this park has no relationship with the remaining parks in the system.

Recommendation # 31:

The Provincial Parks System divest for a nominal fee the Buffaloland Provincial Park and its Buffalo and Deer herds to the community based group interested in establishing the "Harvey Moore Centre at Milltown Cross".

11.13 Confederation Trail

The Confederation Trail is a new and integral part of the Provincial Parks System. It offers a new challenge to communities who have adopted a passion for health, recreation and tranquility. Already, the Trail has demonstrated its tourism value with many tour operators taking the opportunity to position the uniqueness of this route as a quality biking and hiking venue to experience a variety of PEI's landscape. Not unlike the other parks, the Confederation Trail offers new challenges to government as owners and managers of a combination community/tourism product.

It is a new challenge for Provincial Parks that up to now has managed only staffed recreation/accommodation sites. Positioning this linear park as an integral part of the provincial vision for tourism will take a much broader approach by government.

Recommendation # 32:

The Provincial Parks System should continue to support the development and operations of the Confederation Trail as an integral part of the Provincial Parks System by:

- ✓ **developing a strategic approach to marketing the Trail within the Provincial Parks System;**
- ✓ **develop branding and commitment to its linear park focus;**
- ✓ **provide more interpretative and information signing throughout;**
- ✓ **providing more linkages to amenities (accommodations, attractions, food services, retail);**
- ✓ **developing value added packages, guided trail expeditions; and**
- ✓ **completing the trail to Borden-Carleton.**

11.14 Mill River Fun Park

The Mill River Fun Park is a part of a number of tourism products at the Mill River Provincial Park location. Tourism product opportunities at Mill River that should be examined for development include:

- the integration of the Fun Park physically, and from a management and operations perspective with the Mill River Provincial Park;
- the integration of the programs and activities from a marketing perspective with Rodds Resorts;
- redevelop and upgrade the Fun Park:
  - by adding new amenities i.e. outdoor pool, food and beverage, modern play stations,
  - creating a more inviting and visible first impression at the entrance, and
  - removing the empty restaurant facility at the entrance or using the facility for other park purposes.
- determine whether the concept of the Leisure Village provides the highest and best use of this property, and if not, incorporate the already built water and sewage infrastructure into additional recreational vehicle camp sites;
- integration and utilization of the Hernwood School during the months of July and August to accommodate larger convention groups; and
- use the facilities as an adventure centre for the area's all seasons outdoor adventure products and packages e.g. Mill River Marina, kayaking, canoeing, nature trails, bird watching, Lennox Island activities, cross country skiing, snowshoeing, dog races, maple syrup events.

The pursuit of these opportunities would:

- Present a major family tourism development in Western PEI.
- Present a seamless product to the customer.
- Present a wide variety (cluster) of tourism recreational opportunities with strong branding targeting the site on specific markets.
- Provide strong decentralized on-site management and operations leadership.
- Avoid duplication and overlap of operations and maintenance functions within each park element.
- Provide independent financial controls, operations performance measurement and accountability for the Mill River developments.

Recommendation # 33:

The Provincial Parks System should continue to support the development and operations of the Mill River Fun Park as an integrated element of the "Mill River Recreational Resort". Prepare a master plan to move the concept forward that considers:

- ✓ **the integration of the Fun Park physically, and from a management and operations perspective with the Mill River Provincial Park**
- ✓ **the integration of the programs and activities from a marketing perspective with Rodds Resorts;**
- ✓ **the redevelopment and upgrade of the Fun Park:**
  - **by adding new amenities, i.e. outdoor pool, food and beverage, modern play stations;**
  - **creating a more inviting and visible first impression at the entrance, and**
  - **removing the empty restaurant facility at the entrance or using the facility for other park purposes;**
- ✓ **whether the concept of the Leisure Village provides the highest and best use of this property, and if not, incorporate the already built water and sewage infrastructure into additional recreational vehicle camp sites;**
- ✓ **the integration and utilization of the Hernwood School during the months of July and August to accommodate larger convention groups; and**
- ✓ **the use the facilities as an adventure centre for the area's all seasons outdoor adventure products.**

11.15 Brookvale Winter Activity Park

Brookvale Winter Activity Parks plays a vital role providing Islanders and visitors an excellent recreational opportunity during all seasons of the year. As winter tourism strategies continue to unfold, this park will continue to be an important part of the Island's winter tourism product.

Recommendation # 34:

The Provincial Parks System should continue to operate and maintain the Brookvale Winter Activity Park as an important part of the Provincial tourism product.

Appendix

Capital Improvement Estimates
Mill River Concept Plan
Financial Statements 2000 and 2001 Seasons
Proforma Financial Plan
List of Persons and Groups Consulted
Benchmarking and Best Practices User-Pays Revenue

Capital Improvement Estimates

PARK CAPITAL IMPROVEMENT LIST PARKS EAST	Immediate	1-5 Years	5-10 Years	Total
DAY USE PARKS				
Kings Castle				
Wheel chair ramp for Kitchen Shelter 2	$3,000			$3,000
Build 3rd Kitchen Shelter		$15,000		$15,000
Replace washroom		$150,000		$150,000
Cosmetic and site improvements	$25,000		$25,000	$50,000
	$28,000	$165,000	$25,000	$218,000
Basin Head				
Replace sewage disposal system	$100,000			$100,000
	$100,000			$100,000
Wood Islands				
Cosmetic and site improvements	$10,000		$10,000	$20,000
	$10,000		$10,000	$20,000
Buffaloland				
Upgrade road system		$20,000		$20,000
New barn roof and repairs	$20,000			$20,000
	$20,000	$20,000		$40,000
Souris Beach				
Remodel washrooms for barrier free		$25,000		$25,000
		$25,000		$25,000
Pinette				
Remodel washrooms to be barrier free		$25,000		$25,000
		$25,000		$25,000
Day Use SubTotal	**$158,000**	**$235,000**	**$35,000**	**$428,000**
CAMPGROUNDS				
Red Point				
Renovate East Washroom	$35,000			
Cosmetic and site improvements	$25,000		$50,000	$75,000
	$60,000		$50,000	$110,000
Campbell's Cove				
Renovate washroom to barrier free		$30,000		
Repair road to sites 31-36	$10,000			
Cosmetic and site improvements	$25,000		$25,000	$50,000
Replace wiring to 9 2W sites	$10,000			
	$45,000	$30,000	$25,000	$100,000
Brudenell				
Replace washroom # 1 Norton		$150,000		
Replace washroom # 2 Norton			$150,000	$150,000
New campground equipment storage building	$20,000			
Cosmetic and site improvements	$75,000		$50,000	$125,000
	$95,000	$150,000	$200,000	$445,000

	Immediate	1-5 Years	5-10 Years	
Panmure Island				
Redesign and rebuild road for sites 38-43	$20,000			
2 new washing machines	$1,500			
Remodel washroom for barrier free	$25,000			
Video surveillance of beach area from campgrounc	$10,000			
Additional boardwalks to beach	$20,000			
Site and cosmetic improvements	$50,000		$50,000	$100,000
	$126,500		$50,000	$176,500
Lord Selkirk				
New washroom at top		$150,000		
New road for sites 36-51 (600m)		$20,000		
Cosmetic and site improvements	$100,000	$50,000	$50,000	$200,000
Remove underground oil tank at lower washroom	$10,000			
	$110,000	$220,000	$50,000	$380,000
Northumberland				
Upgrade 10 existing 2W to 3W sites		$50,000		
Upgrade existing 3W sites- fill required	$15,000			
Cosmetic and site improvements	$30,000	$25,000	$25,000	$80,000
Park office new roof and new washroom	$15,000			
Remodel WR 3W for barrier free	$30,000			
Improve lighting office/entrance	$2,000			
	$92,000	$75,000	$25,000	$192,000
Campground Sub Total	$528,500	$475,000	$400,000	$1,403,500
Parks East Total	**$686,500**	**$710,000**	**$435,000**	**$1,831,500**
PARKS WEST				
DAY USE PARKS				
Chelton Beach				
Replace washroom	$150,000			
Upgrade Road		$20,000		$20,000
	$150,000	$20,000		$170,000
Victoria				
Remodel washrooms to make barrieer free	$35,000			$35,000
	$35,000			$35,000
Argyle Shore				
Replace kitchen shelter		$15,000		$15,000
		$15,000		$15,000
Bloomfield				
Replace washroom		$150,000		$150,000
		$150,000		$150,000
Belmont				
Replace washroom building		$150,000		$150,000
		$150,000		$150,000
Fisherman's Haven				
Site improvements			$5,000	$5,000

	Immediate	1-5 Years	5-10 Years	
Bonshaw				
Site improvements			$5,000	$5,000
Union Corner				
Site improvements			$5,000	$5,000
Day Use SubTotal	$185,000	$335,000	$15,000	$535,000
CAMPGROUNDS				
Green Park				
Replace concrete floor Kitchen Shelter day use	$5,000			
Cosmetic and site improvements	$25,000		$25,000	$50,000
Demolish abandoned building labelled employees only and remove 2 small abandoned buildings in day use area	$7,500			$7,500
	$37,500		$25,000	$62,500
Cedar Dunes				
Upgrade ventilation.Day use WR 1	$3,500			$3,500
Remodel washroom 2 for barrier free	$25,000			$25,000
Cosmetic and site improvements	$25,000		$25,000	$50,000
Additional washer and dryer	$1,500			$1,500
Upgrade sites 21-30 electrical to 30 amp from 15		$20,000		$20,000
	$55,000	$20,000	$25,000	$100,000
Strathgartney				
New washroom top of hill for sites 38-43		$150,000		$150,000
Park office with washroom		$10,000		$10,000
Camping cabins			$75,000	$75,000
Water for lower tent sites		$1,000		$1,000
Rebuild 2 way sites across from WR 2		$10,000		$10,000
Replace Washroom 1			$150,000	$150,000
Cosmetic and site improvements	$25,000		$25,000	$50,000
Upgrade ventilation in WR 2	$5,000			$5,000
	$30,000	$171,000	$250,000	$451,000
Jacques Cartier				
Replace Office		$25,000		$25,000
Replace WR 2W sites		$150,000		$150,000
Additional washer and dryer	$1,500			$1,500
Replace oil tank at WR 2W	$1,000			$1,000
Remodel tenting washroom to be barrier free		$25,000		$25,000
Cosmetic and site improvements	$50,000		$25,000	$75,000
	$52,500	$200,000	$25,000	$277,500
Linkletter				
Replace WR 1	$150,000			$150,000
Electricity to sites 63-69		$5,000		$5,000
Park office with washroom		$30,000		$30,000
Upgrade electrical to sites 46-51 to 30 amp		$20,000		$20,000
Upgrade electrical to sites 52-62, add sewer			$25,000	$25,000
Roofing all buildings	$15,000			$15,000
Cosmetic and site improvements	$100,000		$50,000	$150,000
	$265,000	$55,000	$75,000	$395,000

	Immediate	1-5 Years	5-10 Years	
Cabot Beach				
Upgrade electrical 2W sites to 50 amp		$100,000		$100,000
Cosmetic and site improvements	$25,000		$25,000	$50,000
	$25,000	$100,000	$25,000	$150,000
Mill River				
Cosmetic and site improvements	$10,000		$25,000	$35,000
	$10,000		$25,000	$35,000
Campground Sub Total	$475,000	$546,000	$450,000	$1,471,000
Parks West Total	**$660,000**	**$881,000**	**$465,000**	**$2,006,000**
Parks East Total (page 2)	**$686,500**	**$710,000**	**$435,000**	**$1,831,500**
TOTAL EAST & WEST	**$1,346,500**	**$1,591,000**	**$900,000**	**$3,837,500**
Brookvale				
Pave lower parking lot		$100,000		$100,000
Enlarge lodge side towards Crapaud			$250,000	$250,000
Reconfigure lower floor area for equipment rentals		$10,000		$10,000
Inside storage for snow making equipment		$100,000		$100,000
Locked storage compound		$25,000		$25,000
Building for second groomer		$100,000		$100,000
Additional electrical for snow making outlets		$50,000		$50,000
		$385,000	$250,000	$635,000
Mill River Fun Park				
Cosmetic and site improvements	$100,000			$100,000
TOTAL	**$1,446,500**	**$1,976,000**	**$1,150,000**	**$4,572,500**
10% Contingency	$144,650	$197,600	$115,000	$457,250
10% Engineering and Design	$144,650	$197,600	$115,000	$457,250
CAPITAL TOTAL	**$1,735,800**	**$2,371,200**	**$1,380,000**	**$5,487,000**

NOTES:

Estimates are 2001 dollars.
Equipment purchase is not included.
Each Park requires a specific master plan for use, improvements and upgrades.

Mill River Concept Plan

BLOOMFIELD DAY PARK
EXPANDED FUN PARK
NEW VACATION COTTAGES
RODD RESORT
EXISTING CAMPGROUND
NEW ENTRANCE TO FUN PARK
MILL RIVER RESORT
MILL RD - RTE 1
Rte 2 - Western Road
Mill River All Inclusive Family Recreation Destination
Oct. 2, 2001

Financial Statements 2000 and 2001 Seasons

Provincial Parks Financial Statement			
Day Use Parks 2000			
Day Parks	Expenses	Wages	Total Expenses
Fishermen's Haven	391	7,262	7,653
Bloomfield	349	0	349
Belmont	589	7,641	8,231
Union Corner	1,700	6,956	8,656
Chelton Beach	3,290	17,266	20,556
Victoria	4,875	8,438	13,313
Argyle Shore	1,893	6,958	8,851
Pinette	879	6,997	7,876
Basin Head	6,634	45,029	51,663
Souris Beach	4,494	7,961	12,455
Wood Islands	401	6,492	6,893
Kings Castle	5,646	35,030	40,676
Buffalo Land	9,693	0	9,693
Total Day Parks	40,834	156,030	196,864

Provincial Parks Financial Statement					
Campgrounds 2000					
Camping Parks	Revenue	Expenses	Wages	Total Expenses	Deficit
Jacques Cartier	51,934	9,030	69,689	78,719	(26,785)
Mill River	61,841	36,360	81,901	118,261	(56,420)
Cedar Dunes	40,908	10,432	56,579	67,011	(26,103)
Green Park	23,971	8,670	48,566	57,236	(33,265)
Linkletter	63,955	16,234	54,066	70,300	(6,345)
Cabot	110,842	19,783	95,409	115,192	(4,350)
Strathgartney	29,549	6,533	53,065	59,598	(30,049)
Northumberland	50,484	11,765	54,516	66,281	(15,797)
Lord Selkirk	48,545	16,143	52,284	68,427	(19,882)
Panmure Island	41,137	11,914	54,457	66,371	(25,234)
Brudenell	93,173	26,483	79,256	105,739	(12,566)
Red Point	100,338	12,855	78,078	90,933	9,405
Campbell's Cove	27,760	9,918	42,348	52,266	(24,506)
Total Campgrounds	744,437	196,120	820,214	1,016,334	(271,897)

Provincial Parks Financial Statement				
Other Parks Operations 2000				
	Revenue	Expenses	Wages	Total
Brookvale Winter Park	328,101	145,551	265,797	411,348
Confederation Trail-West		6,861	0	6,861
Confederation Trail-East		6,508	0	6,508
Gateway Village		4,383	2,884	7,267
Total Other Park Operations	328,101	163,303	268,681	431,984

	Provincial Parks Financial Statement			
	Regional Operations 2000			
		Expenses	Salaries	Expenses
West Parks Operations & Maintenance		202,577	82,869	285,446
Western Region-Mobile		5,576	33,852	39,428
Western Recreation		15,119	39,655	54,774
Other Properties-West		1,272	0	1,272
Total West		224,544	156,376	380,920
East Parks Operations & Maintenance		33,872	126,140	160,012
Eastern Region-Mobile		0	15,452	15,452
Eastern Recreation		9,788	19,688	29,476
Total East		43,660	161,280	204,940
Grand Total Regional Operations		268,204	317,656	585,859

	Provincial Parks Financial Statement			
	Management & Administration 2000			
		Expenses	Wages	Total
Administration in Regions		26,096	68,572	94,668
Headquarters Management & Promotions		208,077	130,827	338,904
Total Management and Administration		234,173	199,399	433,572

DAY USE PARKS 2001

	Wages	Operating Expenses	Net
Souris Beach	7,463	1,332	(8,795)
Argyle Shore	6,965	1,760	(8,725)
Victoria	8,446	1,884	(10,331)
Wood Islands	6,982	1,130	(8,112)
Pinette	6,979	1,909	(8,888)
Belmont	7,651	2,041	(9,691)
Union Corner	6,964	2,329	(9,293)
Chelton Beach	17,838	3,788	(21,626)
Fisherman's Haven	6,965	2,025	(8,990)
Bloomfield	0	1,265	(1,265)
Total Day Use Parks	76,252	19,463	(95,715)

CAMPGROUND PARKS 2001

	Revenue Before Taxes	Wages	Operating Expenses	Total Expenses	Net
Mill River	55,972	91,274	16,914	108,188	(52,216)
Jacques Cartier	44,360	64,689	12,670	77,359	(32,999)
Strathgartney	37,839	51,657	7,231	58,887	(21,048)
Cedar Dunes	45,255	61,356	9,809	71,164	(25,909)
Green Park	28,528	49,955	6,540	56,494	(27,966)
Linkletter	74,228	51,519	11,582	63,101	11,127
Cabot	79,976	99,916	23,122	123,038	(43,062)
Total West	366,158	470,365	87,867	558,232	(192,074)
Brudenell	94,349	83,005	43,001	126,006	(31,657)
Lord Selkirk	45,910	53,849	8,985	62,834	(16,924)
Northumberland	47,837	52,692	12,617	65,309	(17,472)
Panmure Is	42,320	46,077	24,402	70,479	(28,159)
Red Point	98,086	85,598	20,109	105,707	(7,621)
Campbell's Cove	35,440	40,324	9,652	49,976	(14,536)
Total East	363,942	361,545	118,766	480,311	(116,369)
Grand Total	730,100	831,910	206,632	1,038,543	(308,443)

BUILT ATTRACTIONS 2001

Basin Head	Wages	Operating Expenses	Net
Buffalo Land	0	7,816	(7,816)
Kings Castle	26,577	7,860	(34,437)
Mill River Fun Park	53,661	0	(53,661)
Total Built Attractions	116,797	25,464	(142,261)

PARKS MANAGEMENT 2001

General	31,181	140,091	(171,272)
Parks Management	101,812	110,986	(212,798)
Total Management	132,993	251,077	(384,070)

WEST ADMIN & MAINTENANCE 2001

	Wages	Operating Expenses	Total
Administration -West	25,659	5,805	31,464
West Maintenance	68,126	24,157	92,283
Western Mobile Crew	32,354	5,201	37,555
Total	126,139	35,163	161,302
OTHER WEST 2001			
Mill River Recreation	17,952	9,061	27,013
Confed Trail - West	8,522	0	8,522
Gateway Village**	19,365	4,397	23,763
Total	45,839	13,458	59,297
EAST ADMIN & MAINTENANCE 2001			
Admin-East	21,836	7,153	28,989
Eastern maintenance	58,862	27,094	85,956
Eastern Mobile	17,937	0	17,937
Confed Trail - East	6,870	0	6,870
Eastern Recreation	22,969	10,435	33,404
Total	128,474	44,681	173,155
Grand Total Maintenance	206,667	63,340	270,007

Proforma Financial Plan

Provincial Parks System Proforma Revenue and Expense	Revenue	Operating Costs	Salaries & Wages	Total Costs	Net
Day Parks					
Souris Beach		2,500		2,500	(2,500)
Argyle Shore		2,500		2,500	(2,500)
Victoria		2,500		2,500	(2,500)
Bonshaw		2,500		2,500	(2,500)
Wood Islands		2,500		2,500	(2,500)
Pinette		2,500		2,500	(2,500)
Belmont		2,500		2,500	(2,500)
Union Corner		2,500		2,500	(2,500)
Chelton Beach		5,000	4,752	9,752	(9,752)
Fisherman's Haven		2,500		2,500	(2,500)
Bloomfield		2,500		2,500	(2,500)
Total Day Parks		30,000	4,752	34,752	(34,752)
Built Attractions					
Basin Head	4,000	8,000	33,544	41,544	(37,544)
Mill River Fun Park	60,000	75,000	48,232	123,232	(63,232)
Kings Castle	4,000	8,000	27,625	35,625	(31,625)
Brookvale Winter Activity Park	300,000	150,000	160,681	310,681	(10,681)
Total Built Attractions	368,000	241,000	270,082	511,082	(143,082)
Eastern Campground Parks					
Brudenell	90,000	23,750	55,576	79,326	10,674
Lord Selkirk	48,000	19,250	49,038	68,288	(20,288)
Northumberland	50,000	15,000	49,038	64,038	(14,038)
Panmure Island	40,000	11,000	31,209	42,209	(2,209)
Red Point	100,000	22,250	59,219	81,469	18,531
Campbell's Cove	27,000	13,250	23,760	37,010	(10,010)
Total Eastern	355,000	104,500	267,841	372,341	(17,341)
West Campground Parks					
Mill River	60,000	18,000	55,576	73,576	(13,576)
Jacques Cartier	50,000	14,000	26,457	40,457	9,543
Strathgartney	30,000	15,500	39,230	54,730	(24,730)
Cedar Dunes	40,000	14,750	33,673	48,423	(8,423)
Green Park	24,000	17,500	31,209	48,709	(24,709)
Linkletter	64,000	21,000	48,232	69,232	(5,232)
Cabot	110,000	40,750	48,116	88,866	21,134
Total Western	378,000	141,500	282,494	423,994	(45,994)
Total Campground Parks	733,000	246,000	550,335	796,335	(63,335)
West Maintenance & Administration		100,000	93,644	193,644	(193,644)
East Maintenance & Administration		90,000	93,644	183,644	(183,644)
Programs & Surfguards		25,000	171,864	196,864	(196,864)
Total Maintenance & Programs		215,000	359,152	574,152	(574,152)
Management & Administration					
Management			196,000	196,000	(196,000)
Marketing		125,000		125,000	(125,000)
Materials, Supplies and Services		100,000		100,000	(100,000)
Finance and Administration		50,000	89,000	139,000	(139,000)
Contract Services		100,000		100,000	(100,000)
Travel and Training		25,000		25,000	(25,000)
Total Management & Admin		400,000	285,000	685,000	(685,000)
Grand Total	1,101,000	1,132,000	1,469,321	2,601,321	(1,500,321)

PEI Provincial Parks System Proforma Revenue and Expense Summary	Revenue	Operating Costs	Salaries/Wages	Total Expenses	Net
Day Use Parks		30,000	4,752	34,752	(34,752)
Built Attractions	368,000	241,000	270,082	511,082	(143,082)
Campground Parks	733,000	246,000	550,335	796,335	(63,335)
East/West Maintenance/Administration		215,000	359,152	574,152	(574,152)
Management & Administration		400,000	285,000	685,000	(685,000)
Grand Total	1,101,000	1,132,000	1,469,321	2,601,321	(1,500,321)

		Human Resources Plan			
	Weeks Open	Park Supervisors	Park Workers	Work Weeks Workers	Work Weeks Supervisors
Day Parks					
Souris Beach	17	Basin Head		0	0
Argyle Shore	12	Strathgartney		0	0
Victoria	12	Strathgartney		0	0
Bonshaw	12	Strathgartney		0	0
Wood Islands	15	Northumberland		0	0
Pinette	14	Lord Selkirk		0	0
Belmont	15	Linkletter		0	0
Union Corner	15	Linkletter		0	0
Chelton Beach	11	Chelton Beach	1	11	0
Fisherman's Haven	11	Jacques Cartier		0	0
Bloomfield	17	Mill River		0	0
Total Day Parks	**151**		**1**	**11**	**0**
Built Attractions					
Basin Head	17	1	3	51	17
Mill River Fun Park	17	1	5	85	17
Kings Castle	14	1	3	42	14
Brookvale Winter Activity Park	14	1	25	350	14
Total Built Attractions	**62**	**4**	**36**	**528**	**62**
Eastern Campground Parks					
Brudenell	17	1	6	102	17
Lord Selkirk	15	1	6	90	15
Northumberland	15	1	6	90	15
Panmure Island	11	1	5	55	11
Red Point	16	1	7	112	16
Campbell's Cove	11	Basin Head	5	55	0
Total Eastern	**85**	**5**	**35**	**504**	**74**
West Campground Parks					
Mill River	17	1	6	102	17
Jacques Cartier	11	1	4	44	11
Strathgartney	12	1	6	72	12
Cedar Dunes	14	1	4	56	14
Green Park	11	1	5	55	11
Linkletter	17	1	5	85	17
Cabot	13	1	7	91	13
Total Western	**95**	**7**	**37**	**505**	**95**
Total Parks	**180**	**12**	**72**	**1,009**	**169**

List of Persons and Groups Consulted

List of Persons and Groups Consulted

Tourism PEI officials
- Frank Butler
- Ron MacNeill
- Chris Jones
- Shane Arbing
- Kevin MacLaren
- Doug Murray
- Kevin Jenkins
- Susan Leduc
- Greg Arsenault
- Vanessa Buote
- John Callaghan
- Kerry McKenna
- Kevin Chaisson, Parks East
- Derek Dyment, Parks West
- Lisa Profit, Parks West
- Dave Blackadar, Mill River Fun Park
- All Parks Officers

Parks Committee meetings:
- Cabot Provincial Park, Friends of the Park Committee
- Pamure Island Park Committee
- Cedar Dunes, West Point Development Group
- Jacques Cartier Park Committee
- Green Park, Tyne Valley Community Group
- Kings Castle, Northumberland Community Development Corporation
- Linkletter Park Improvement Committee

Two community forums; West, O'Leary and East, Montague
TIAPEI Annual Meeting, Mill River
Evangeline Tourist Association
Island Trails Association Meeting
Prince Edward Island Council of the Disabled, Carole-Ann French
Eastern Kings Community Enhancement Corporation, Maureen Campbell-Ross
Belfast Community Development Corporation, Al Rogers General Manager
Parks Canada & PEI Travel Park Association, Bill Hogg
Rodds Hotels and Resorts, John Cudmore
Harvey Moore Wildlife Management Area, Southeast Environmental Association Ltd., David Boyce
Summerside Tourism Association & SRDC
- Don Groom
- David Anderson
- Ted Henderson
- Alan Savidant

Mayor Basil Stewart, Summerside
Mayor James Hughes, Souris
Chairperson Gary McLure, Victoria
PEI Department of Environment Officials
- Dianne Griffin
- Bruce Smith
- Art Smith
- Rose Marie Curley

Island Nature Trust, Kate MacQuarrie
Individual Submissions
- Donna Williams, Ellerslie
- Wally Walsh, O'Keefe Lake
- Bruce Champion, Cabot
- Mathew Brown, O'Leary
- Rose Marie Robichaud, Tignish
- Daryl Guignion, Assoc. Professor, UPEI, and Student Beth Hoar

MLAs:
- Phillip Brown
- Helen MacDonald
- Cletus Dunn
- Eva Rodgerson

Benchmarking and Best Practices User-Pays Revenue

Benchmarking And Best Practice Program

User-Pays Revenue

Lead Agency
Queensland Parks and Wildlife Service
February 2000

SUMMARY

User-pays systems have been adopted, to varying degrees, by conservation agencies in all Australian states and territories. Fees are charged for entry to protected areas, camping, recreational facilities, interpretive services, leases and licences, commercial activities and other facilities and services.

Revenue objectives vary according to the type of facility or service. Conservation of natural and cultural resources is generally regarded as a community service obligation and a user-pays system is not applicable. For commercial activities with little or no relationship to the agency mandate, such as the establishment of communication facilities or grazing licences, the revenue objective is at least total cost recovery or full economic rent. Charges for visitor services reflect a balance between the community service obligation (supported by the agency) and user-pays revenue.

This benchmarking-best practice project has:

- researched systems of user pays revenue operating in states and territories of Australia;
- investigated other options for the operation of user pays systems;
- analysed the data collected; and
- developed recommendations for best practice in user-pays revenue systems.

Outcomes of user-pays

Desired outcomes of a user-pays system were assumed to be cost-effectiveness, improved park management, better visitor facilities and services, and positive public attitudes towards the agency and protected area management. All agencies were positive about their achievement of these outcomes, though most felt their systems were still being improved and expanded.

Cost effectiveness was difficult to evaluate as most states had no accurate estimation of their costs. A suggested best practice is the adoption of accounting systems which make it easier to recognise the costs of revenue collection and user-pays system administration.

Improved conservation management was achieved largely through better visitor management and awareness, and through greater channelling of agency funds into resource management as visitor services become more self-supporting.

Client services and facilities were greatly improved where user-pays revenue was retained by parks services. Local retention of revenue was most commonly mentioned as the key factor in creating a positive cycle from revenue to better services and facilities to positive public attitude and back to increased revenue. The importance of funding projects appropriate to the desired management settings of protected areas was also identified.

Processes

The processes evaluated were revenue raising (which consisted of a number of sub-processes), promoting public awareness and acceptance, staff training and support, distribution of funds, and the linking of commercial operations to conservation objectives.

Revenue raising The net revenue raised was influenced by the fee level and structure, the efficiency of collection and administration, and the effectiveness of compliance and monitoring.

Best practice recommendations included:

- Agencies should have the ability to adjust fees, at least to the level of the Consumer Price Index, and the public should be informed to expect these small rises at regular intervals;
- Fees should be set to reflect the level of service, the revenue objectives, estimated public willingness to pay, and comparative charges in the market-place. Necessary research should be undertaken before new fees are set;

- Relatively simple fee structures are easier to administer, but some concessions for families and low income earners are desirable. Multiple-use passes for park entry are cost-effective;
- New or increased fees for commercial operators should be advised 12-18 months in advance;
- A range of fee collection methods is available, and agencies should investigate best options depending on the circumstances. The use of contractors is an effective option in some places;
- A high level of compliance should be aimed for to boost cost efficiency and to establish a professional and serious image for the agency. However in low-visitation parks the expense of compliance checking may outweigh the benefits.

Promoting public awareness and acceptance of user-pays

Most agencies felt that there was a high level of public acceptance of user-pays systems, though some problems were mentioned. Key factors identified in encouraging public support were:

- Provision of clear information in advance and efficient delivery of service (especially relating to commercial operators);
- Funds are retained by the agencies - preferably in the local district - and result in improvements to facilities and park management;
- Public perceive they are getting value for money; and that the system is fair and equitable; and
- Discounts are available for children and pensioners.

Staff training and support

The enthusiastic support and participation of protected area staff in collecting revenue and administering the user-pays system are critical. Establishing a direct link between revenue collection and increased funding was mentioned by a number of states as a key factor in motivating staff to implement the system to the best of their ability. Best practices identified included:

- Selection and training of staff who are enthusiastic and competent in dealing with the public;
- Consideration of staff safety as a high priority and;
- Gaining staff support through increased funding back to the park/local district.

Distribution of funds

Best practices identified in relation to fund distribution included:

- One hundred percent revenue retention by the management agency;
- Retention of at least a proportion of funds within the local area; and
- Disbursement of funds to appropriate projects which are in keeping with the desired management setting of the protected area in question. Funding distribution should not create major inconsistencies in standards between protected areas

Linking commercial operations to conservation objectives

User-pays systems can contribute to conservation objectives through increased contact with and if necessary, regulation of day visitors, campers, tour operators, commercial photographers and other clients. Best practices identified included:

- Establishing good relationships with and controls over all types of commercial operators, and ensuring that all conditions of permits, leases and other agreements are adequate and fulfilled;
- The use of the user-pays system to collect good visitor data; and
- Ensuring that core business is not over-ridden by commercial interests.

In conclusion, revenue-raising on protected areas has been accepted throughout Australian nature conservation agencies as a necessary adjunct to central funding. Improved conservation outcomes and better visitor services and facilities can be achieved provided certain conditions are established and practices followed.

Best practice model for user-pays revenue

A model for investigating best practice in user-pays systems is shown in the following figure.

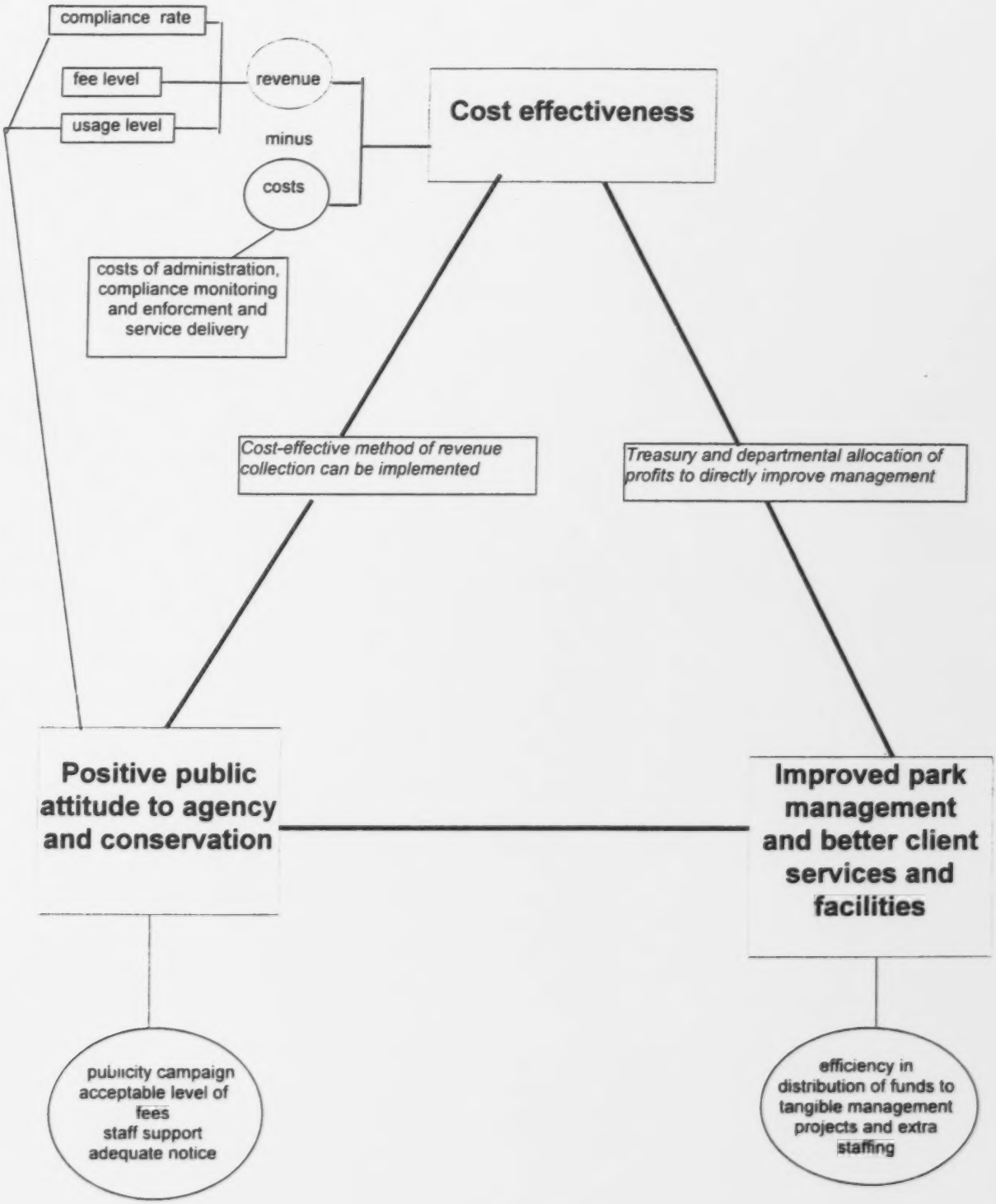
This is based on the desired outcomes stated above:

- cost effectiveness;
- improved park management and better visitor services and facilities; and
- positive public attitudes towards the agency and protected area management.

The three desired outcomes form a triangle, with increased cost effectiveness leading to better park management, and thence to the increased public support which in turn enables greater profitability. The primary filters on this positive flow, as shown in the diagram, are:

- **Retention of revenue**: Increased cost effectiveness is assumed to lead to improved park management, but this will only be the case where revenue retention or allocation of profits directly benefits protected area management;
- **Public awareness**: Improved park management and better client services and facilities are assumed to lead to public support for the program, but this will be true only where the public is aware of and appreciative of this improvement. Better staffing and interpretive facilities will have a significant impact on public appreciation. Where funding is provided for resource management activities, these need to be given appropriate publicity;
- **Cost-effective collection and administrative systems**: A positive public attitude can lead to increased revenue and cost effectiveness through improved compliance and a reduction in the level of enforcement required but this will only be so if efficient systems of revenue raising have been implemented.

Model of Investigating Best Practice in User-Pays


compliance rate
fee level
usage level
revenue
minus
costs
Cost effectiveness
costs of administration, compliance monitoring and enforcment and service delivery
Cost-effective method of revenue collection can be implemented
Treasury and departmental allocation of profits to directly improve management
Positive public attitude to agency and conservation
Improved park management and better client services and facilities
publicity campaign
acceptable level of fees
staff support
adequate notice
efficiency in distribution of funds to tangible management projects and extra staffing